Direct Data Entry User Manual

The Ohio Department of Aging
50 W. Broad Street, 9th floor
Columbus, OH 43215

Table of Contents

I. System requirements 1
II. How to Login 1
III. Session timeout 1
IV. Forgotten password 2
V. Forgotten User Name 2
VI. Initial Login Screen and User Roles 2
a) The four Role IDs 2
VII. Who to call for help 3
VIII. Menus 3
a) Invoices menu 3
b) Reports menu 3
c) Maintenance menu 4
d) Print 5
e) Logout 5
IX. Invoice Entry 6
a) Start New Invoice – PAA Administrator or PAA Operator Role 6
b) Start New Invoice – Provider Operator Role 8
c) Enter New Invoice 9
X. Edit an Invoice 13
a) Search Detail Lines 13
b) Remove Invoice 13
XI. Submit Invoice 16
XII. Invoice Status Views 18
a) Invoices by Status 18
b) Filter the List 18
c) Invoice Views Available 19
XIII. Reports 19
a) Invoice Report 19
b) Search Invoice Report 20
c) Consumer and Service Lists 20
XIV. Download EDI Reports – All Roles 22
a) Reports Available for Download 22
b) Select Provider Location 22
c) Search 23
d) Download a Report 23

Date Updated	Version	Description	Contributors	Update Author
09/15/2006	1.0	Initial Version	ODA IT Dept.	C. Brickner
01/04/2007	2.0	Program Changes	ODA IT Dept.	C. Brickner

Direct Data Entry (DDE) User Manual

Direct Data Entry (DDE) will replace the Data Entry Module (DEM) currently used by many Pre-Admission Screening System Providing Options and Resources Today (PASSPORT) providers to enter and submit PASSPORT Information Management System (PIMS) invoices to PASSPORT Administrative Agencies (PAAs).

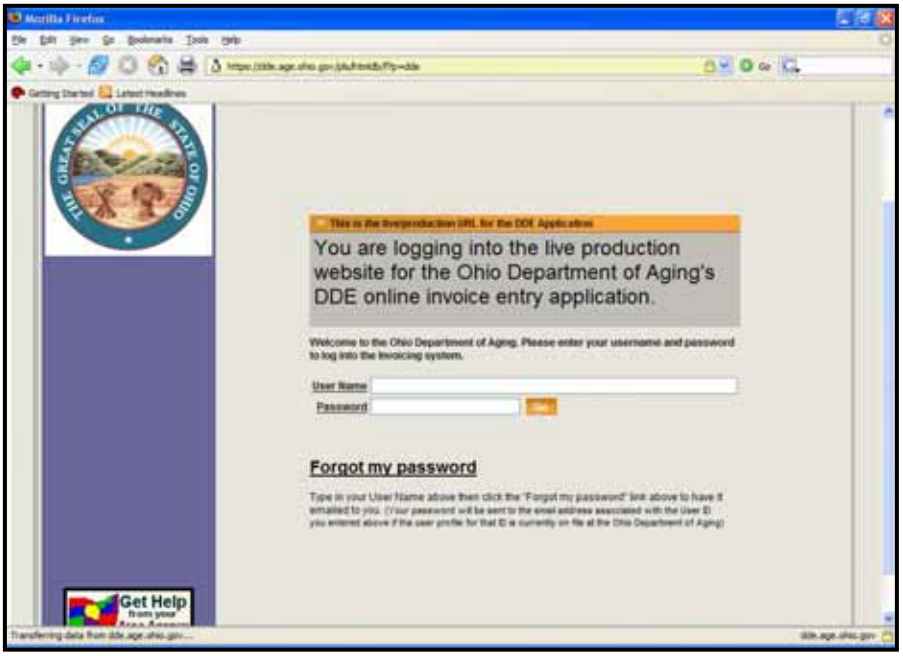
I. System requirements

The minimum PC requirements to utilize the DDE application are 512mb system memory and an operating system capable of running one of the following browser versions (or higher) with JavaScript "enabled".

Mozilla/4.0+, Mozilla/5.0+, MS Internet Explorer 6.0+, Gecko/20060728+, Firefox/1.5.0.6 +

II. How to Login

a) Open a browser.
b) In the address bar enter: https://dde.age.ohio.gov/
c) Press enter. This site can be bookmarked.
d) Enter your user name and password provided to you by your PASSPORT Administrative Agency. Press enter. Username and password are not case-sensitive. If prompted by the browser to save password, decline.
e) Once logged in, change the password for the account by clicking on the Maintenance button and then click on Change Password.
f) If the user attempts to login with an invalid password and exceeds the number of attempts allowed by the system, the account will be disabled. Contact your PAA administrator regarding your account status.


You are logging into the live production website for the Ohio Department of Aging's DDE online invoice entry application.
Forgot my password
Get Help

III. Session timeout

The user's session will timeout after 60 minutes of inactivity. If, for a period of time, you leave the DDE application alone or perform actions (ex: scrolling, entering data, reading a downloaded report) that does not generate a call to the server, the application logs you out and you will be prompted to log in again. A timer will appear on the screen and count down to inform the user when the session will expire. Ex: YOUR SESSION WILL EXPIRE IN 00:59:48.

IV. Forgotten password

a) Type in your User Name then click, "**Forgot my password**" link.
b) The password will be sent to the email address associated with the User Name profile. A deactivated account cannot request their password to be reset.

V. Forgotten User Name

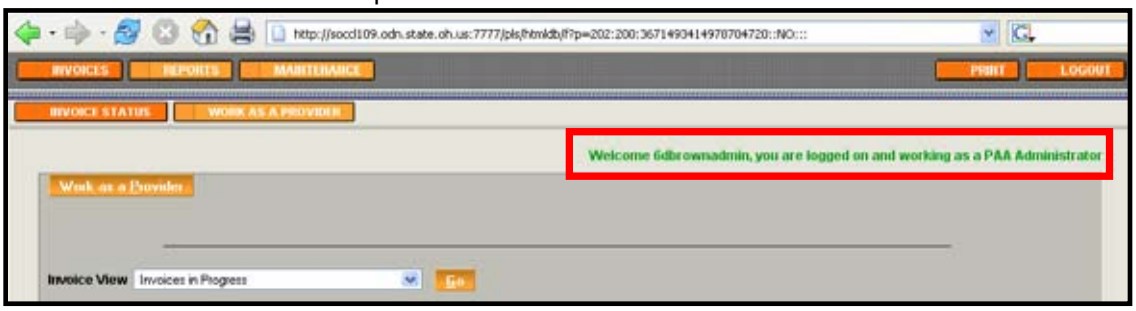
Contact your PAA for a forgotten User Name.

VI. Initial Login Screen and User Roles

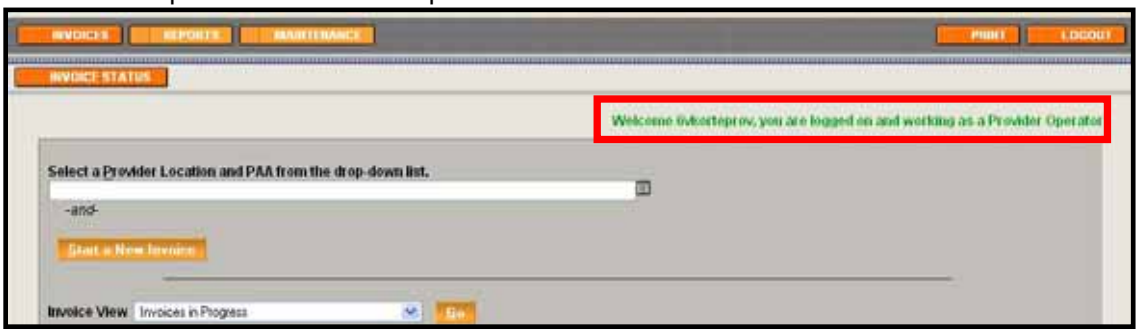
Once logged in, the initial screen will vary depending on your Role ID. The screen will indicate in green text your login Role ID. Ex: **Welcome 6vkorteprov, you are logged on and working as a Provider Operator**.

a) The four Role IDs
PAA Administrator – Controls accounts created under specific PAA and can perform data entry and view reports for provider operators within PAA
PAA Operator – Performs data entry and view reports for provider operators within PAA
Provider Operator Invoice and Reports – Performs data entry and can generate reports for their authorized locations in a PAA
Provider Operator Reports only – Generates reports for their authorized locations in a PAA

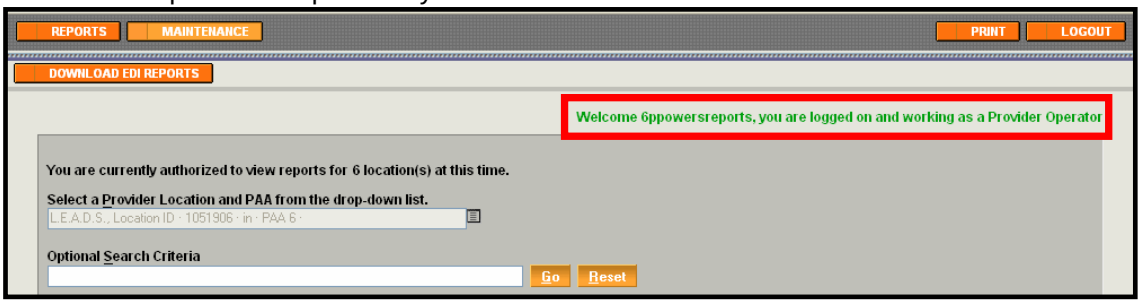
- PAA Administrator & PAA Operator Initial Screen



- Provider Operator - Invoice & Reports Initial Screen



- Provider Operator - Reports Only Initial Screen


REPORTS
MAINTENANCE
PRINT
LOGOUT
DOWNLOAD EDI REPORTS
Welcome 6ppowersreports, you are logged on and working as a Provider Operator
You are currently authorized to view reports for 6 location(s) at this time.
Select a Provider Location and PAA from the drop-down list.
L.E.A.D.S., Location ID - 1051906 - in - PAA 6 -
Optional Search Criteria
Go
Reset

VII. Who to call for help

Contact your PAA for assistance with the application.

VIII.Menus

a) Invoices menu

Invoices – PAA Administrator and PAA Operator Roles

- Displays sub-menus: Invoice Status and Work as a Provider.
- Data displayed will vary according to the option selected from Invoice View.
- To enter an invoice these Roles must work on behalf of a provider.

Invoices – Provider Operator Role

- Displays sub-menu: Invoice Status
- Data displayed will vary according to the option selected from Invoice View.

b) Reports menu

Reports – PAA Administrator and PAA Operator Roles

- Displays sub-menus: Invoice Report, Consumer List, Services List and Download EDI Reports.
- You must either be logged in as a Provider Operator or be working on behalf of one to view the reports and use the Consumer List, Services List and Download EDI Reports sub-menus.
- Click on the "Work as a Provider" button to change who you are working on behalf of.

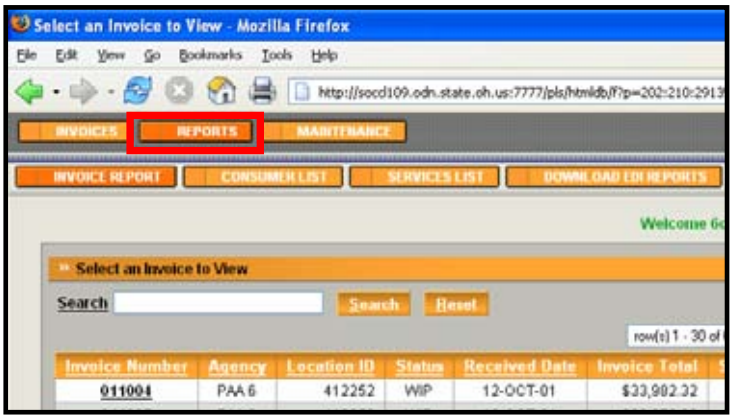
VIII. Menus (con't.)

b) Reports menu (con't.)

- Click the Work As Myself button to logout of the provider location you are working on behalf of.

Reports – Provider Operator Role

- Displays sub-menus: Invoice Report, Consumer List, Services List and Download EDI Reports.



Reports – Provider Operator Reports Only Role

- Displays sub-menu: Download EDI Reports.

Report Download - Mozilla Firefox
REPORTS
MAINTENANCE
DOWNLOAD EDI REPORTS
You are currently authorized to view reports for 1 loc
Select a Provider Location and PAA from the drop do
Optional Search Criteria
Claim Acknowledgment
no data found

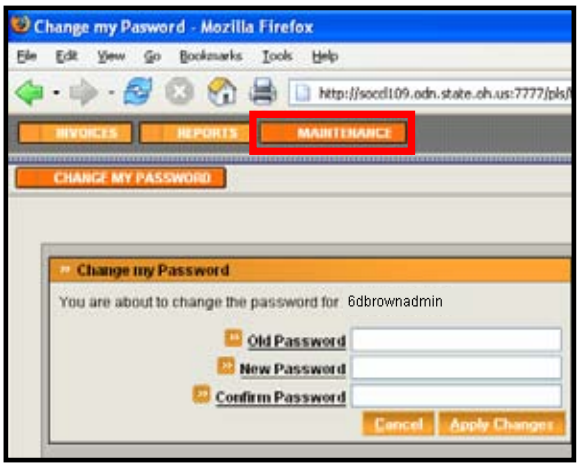
c) Maintenance menu

Maintenance – PAA Administrator

- Displays sub-menus: Change My Password and User Maintenance.

Maintenance – PAA Operator and Provider Operators Roles

- Displays sub-menu: Change My Password.

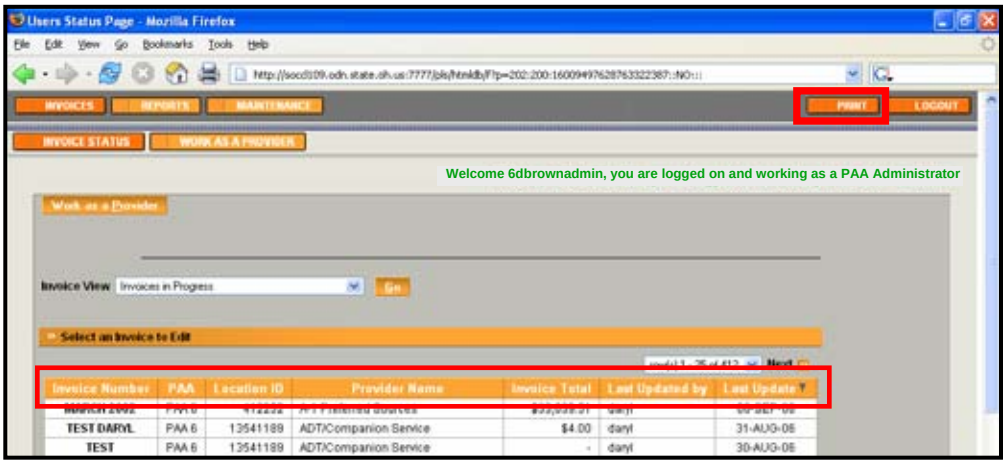


VIII. Menus (con't.)

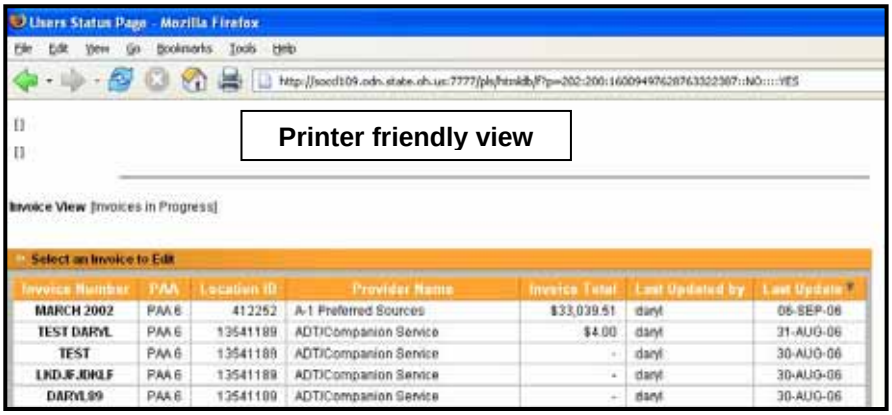
d) Print

All Roles

- The Print button converts the information on the page to a printer friendly view.


Users Status Page - Mozilla Firefox
INVOICES
REPORTS
MAINTENANCE
PRINT
LOGOUT
INVOICE STATUS
WORK AS A PROVIDER
Welcome 6dbrownadmin, you are logged on and working as a PAA Administrator
Work as a Provider
Invoice View Invoices in Progress
Go
Select an Invoice to Edit
Invoice Number PAA Location ID Provider Name Invoice Total Last Updated by Last Update
TEST DARYL PAA 6 13541189 ADT/Companion Service $4.00 daryl 31-AUG-06
TEST PAA 6 13541189 ADT/Companion Service daryl 30-AUG-06

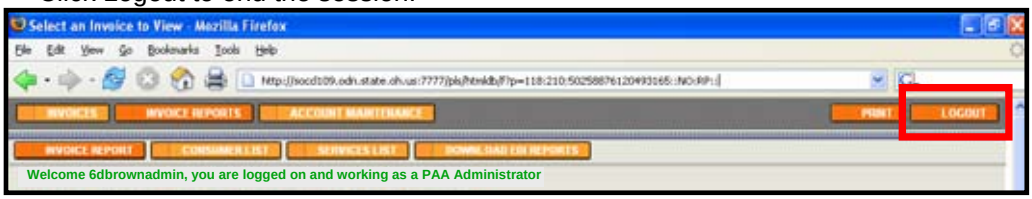
- Click the browser's back button to return to the application.


Users Status Page - Mozilla Firefox
Printer friendly view
Invoice View [Invoices in Progress]
Select an Invoice to Edit
Invoice Number PAA Location ID Provider Name Invoice Total Last Updated by Last Update
MARCH 2002 PAA 6 412252 A-1 Preferred Sources $33,039.51 daryl 06-SEP-06
TEST DARYL PAA 6 13541189 ADT/Companion Service $4.00 daryl 31-AUG-06
TEST PAA 6 13541189 ADT/Companion Service daryl 30-AUG-06
LKDJFJDKLF PAA 6 13541189 ADT/Companion Service daryl 30-AUG-06
DARYL99 PAA 6 13541189 ADT/Companion Service daryl 30-AUG-06

e) Logout

All Roles

- Click Logout to end the session.



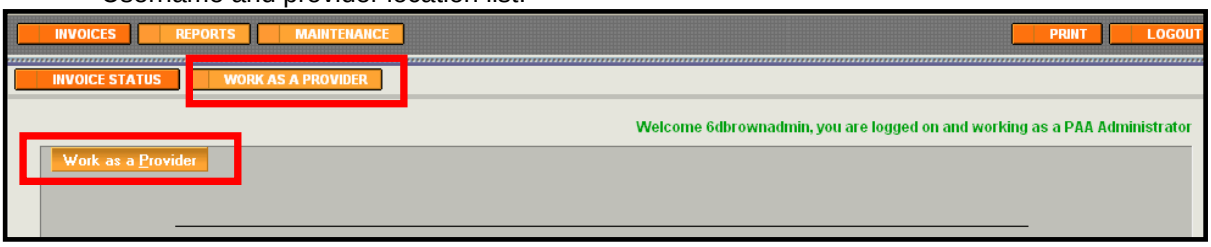
IX. Invoice Entry

To enter an invoice you must be logged in as a Provider Operator, a PAA Administrator or PAA Operator working on behalf of a provider location.

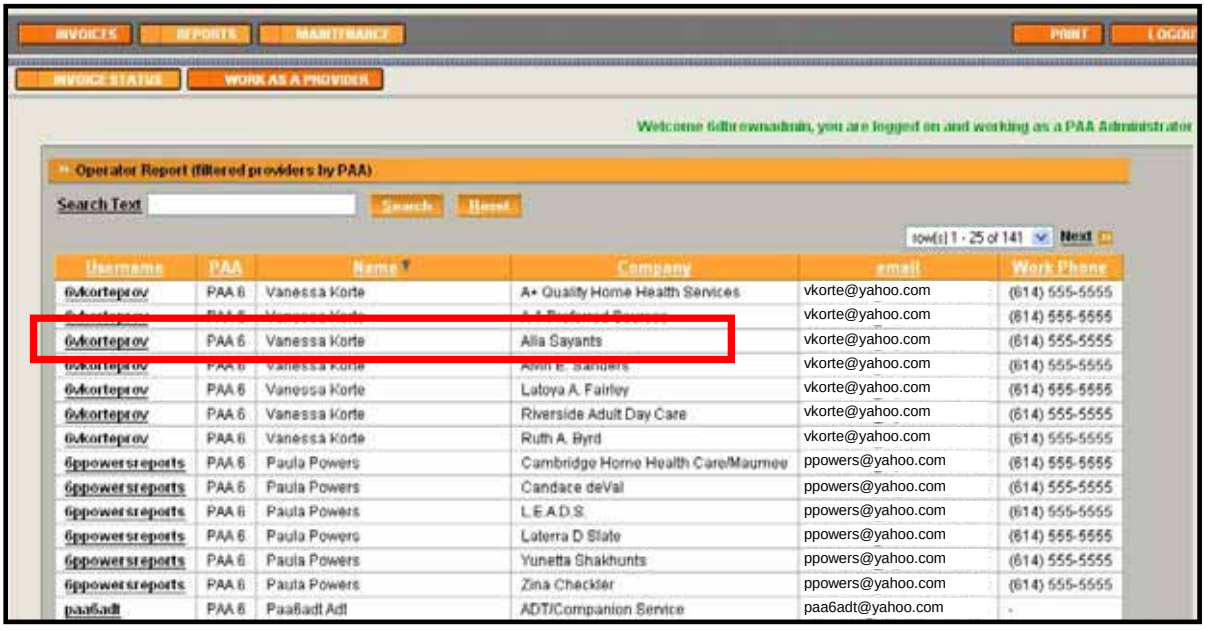
a) Start New Invoice – PAA Administrator or PAA Operator Role

THE PAA SHALL ONLY ENTER AN INVOICE ON BEHALF OF A PROVIDER ONCE THE PROVIDER HAS SUBMITTED THE INVOICE TO THE PAA IN PAPER FORM. AT NO TIME SHALL A PAA ENTER AN INVOICE INTO THE DDE APPLICATION FOR A PROVIDER UNTIL RECEIPT OF THIS PAPER INVOICE.

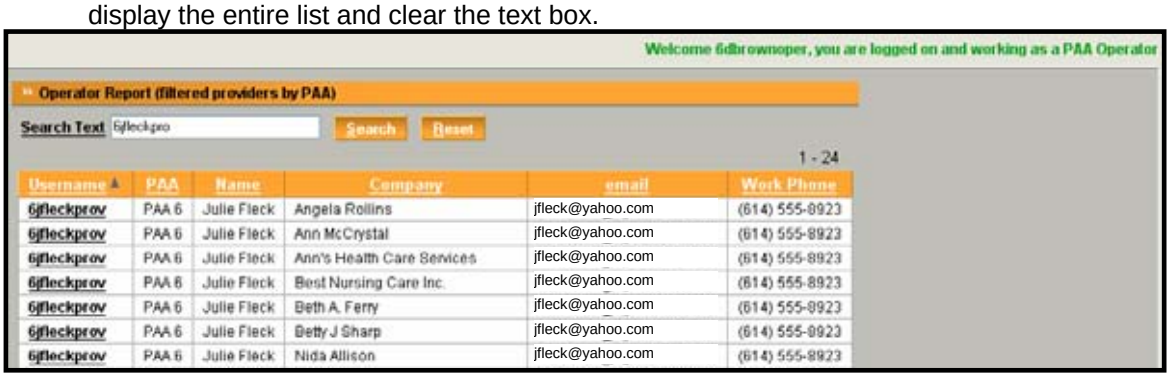
1. From the Invoices screen, click Work as a Provider. Either button will bring you to the Username and provider location list.



2. In the Company column, look for the correct provider location, select the Username. If necessary, click a column heading to sort the information in ascending or descending order.


Operator Report (filtered providers by PAA)
Search Text
Search
Reset
Next
Username
PAA
Name
Company
email
Work Phone
6vkorteprov PAA 6 Vanessa Korte A+ Quality Home Health Services vkorte@yahoo.com (614) 555-5555
6vkorteprov PAA 6 Vanessa Korte Alla Sayants vkorte@yahoo.com (614) 555-5555
6vkorteprov PAA 6 Vanessa Korte Latoya A. Fairley vkorte@yahoo.com (614) 555-5555
6vkorteprov PAA 6 Vanessa Korte Riverside Adult Day Care vkorte@yahoo.com (614) 555-5555
6vkorteprov PAA 6 Vanessa Korte Ruth A. Byrd vkorte@yahoo.com (614) 555-5555
6ppowersreports PAA 6 Paula Powers Cambridge Home Health Care/Maumee ppowers@yahoo.com (614) 555-5555
6ppowersreports PAA 6 Paula Powers Candace deVal ppowers@yahoo.com (614) 555-5555
6ppowersreports PAA 6 Paula Powers L.E.A.D.S. ppowers@yahoo.com (614) 555-5555
6ppowersreports PAA 6 Paula Powers Laterra D Slate ppowers@yahoo.com (614) 555-5555
6ppowersreports PAA 6 Paula Powers Yunetta Shakhunts ppowers@yahoo.com (614) 555-5555
6ppowersreports PAA 6 Paula Powers Zina Checkler ppowers@yahoo.com (614) 555-5555
paa6adt PAA 6 Paa6adt Adt ADT/Companion Service paa6adt@yahoo.com

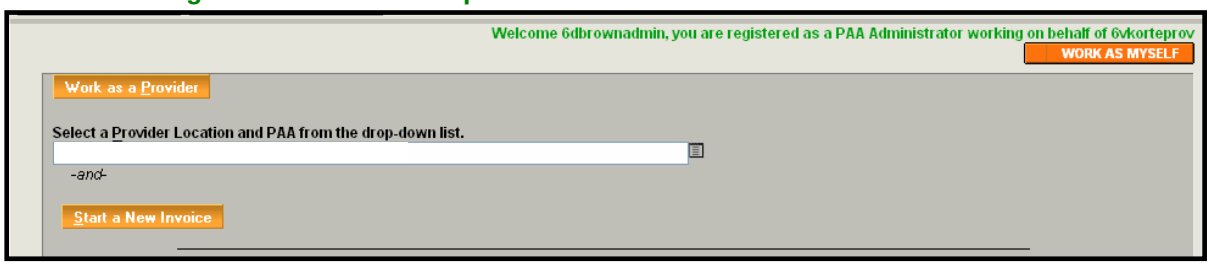
3. To Search, enter a search string in the Search Text text box and click Search. Click Reset to display the entire list and clear the text box.


Welcome 6dbrownoper, you are logged on and working as a PAA Operator
Operator Report (filtered providers by PAA)
Search Text 6jfleckpro
Search
Reset
1 - 24
Username
PAA
Name
Company
email
Work Phone
6jfleckprov PAA 6 Julie Fleck Angela Rollins jfleck@yahoo.com (614) 555-8923
6jfleckprov PAA 6 Julie Fleck Ann McCrystal jfleck@yahoo.com (614) 555-8923
6jfleckprov PAA 6 Julie Fleck Ann's Health Care Services jfleck@yahoo.com (614) 555-8923
6jfleckprov PAA 6 Julie Fleck Best Nursing Care Inc. jfleck@yahoo.com (614) 555-8923
6jfleckprov PAA 6 Julie Fleck Beth A. Ferry jfleck@yahoo.com (614) 555-8923
6jfleckprov PAA 6 Julie Fleck Betty J Sharp jfleck@yahoo.com (614) 555-8923
6jfleckprov PAA 6 Julie Fleck Nida Allison jfleck@yahoo.com (614) 555-8923

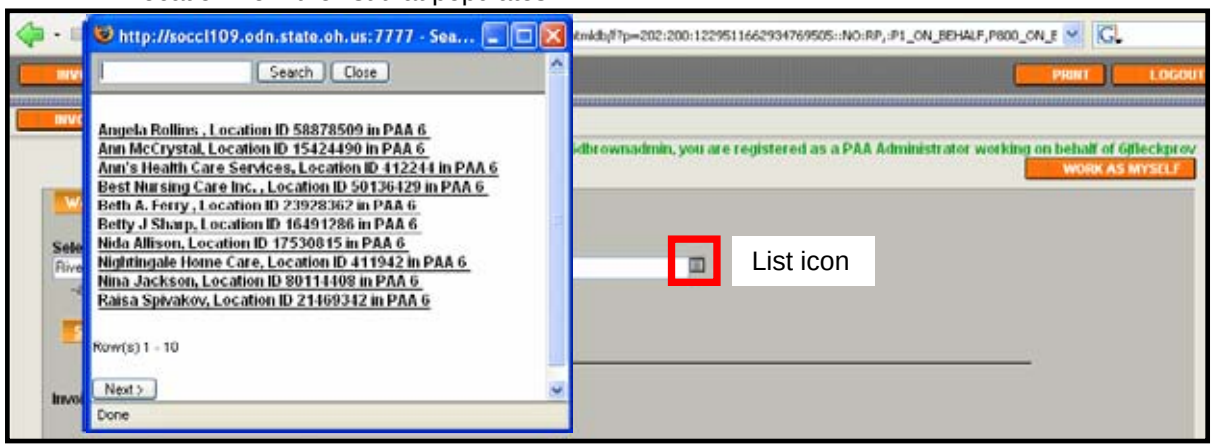
IX. Invoice Entry (con't.)

Start New Invoice – PAA Administrator or PAA Operator Role (con't.)

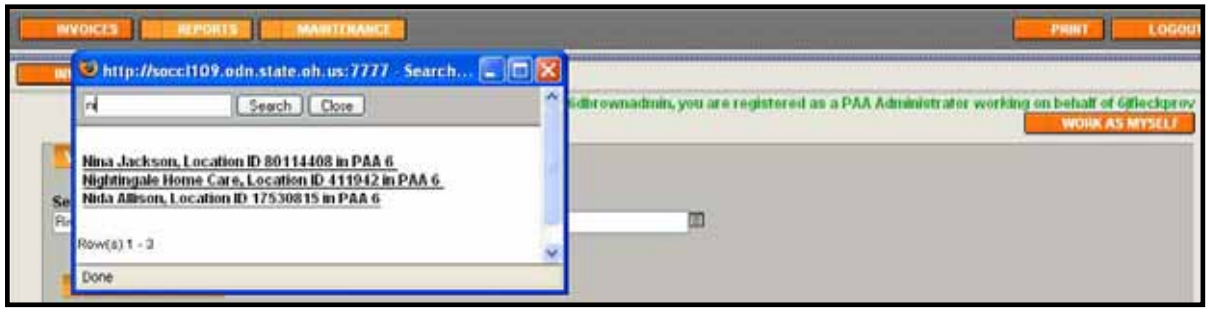
4. Once a Username is selected, the application will indicate the Username you a working on behalf of. Ex: **Welcome 6dbrownadmin, you are registered as a PAA Administrator working on behalf of 6vkorteprov**


Welcome 6dbrownadmin, you are registered as a PAA Administrator working on behalf of 6vkorteprov
WORK AS MYSELF
Work as a Provider
Select a Provider Location and PAA from the drop-down list.
-and-
Start a New Invoice

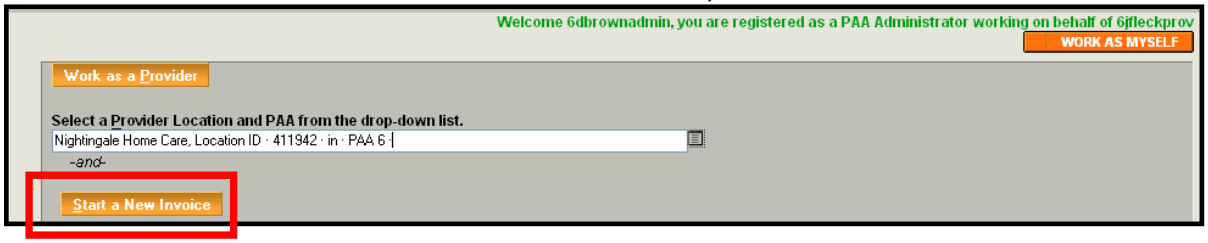
5. Select the correct provider location ID.
   - Click the list icon next to "Select a Provider Location and PAA from the drop-down list" to generate the list of Authorized Location(s) for this user. The first ten rows of names will appear. If necessary, click the Next button to see the next ten names.
   - Or, in the text box, type any characters(s) of the provider or location ID. Select the location from the list that populates.


http://socc109.odn.state.oh.us:7777 - Sea...
Search
Close
Angela Rollins , Location ID 58878509 in PAA 6
Ann McCrystal, Location ID 15424490 in PAA 6
Ann's Health Care Services, Location ID 412244 in PAA 6
Best Nursing Care Inc. , Location ID 50136429 in PAA 6
Beth A. Ferry , Location ID 23928362 in PAA 6
Betty J Sharp, Location ID 16491286 in PAA 6
Nida Allison, Location ID 17530815 in PAA 6
Nightingale Home Care, Location ID 411942 in PAA 6
Nina Jackson, Location ID 80114408 in PAA 6
Raisa Spivakov, Location ID 21469342 in PAA 6
Row(s) 1 - 10
Next >
Done
PRINT
LOGOUT
WORK AS MYSELF
List icon

6. To search for a Location ID, type the first characters of the name in the text box. Click Search. Click the Location ID name to select it.



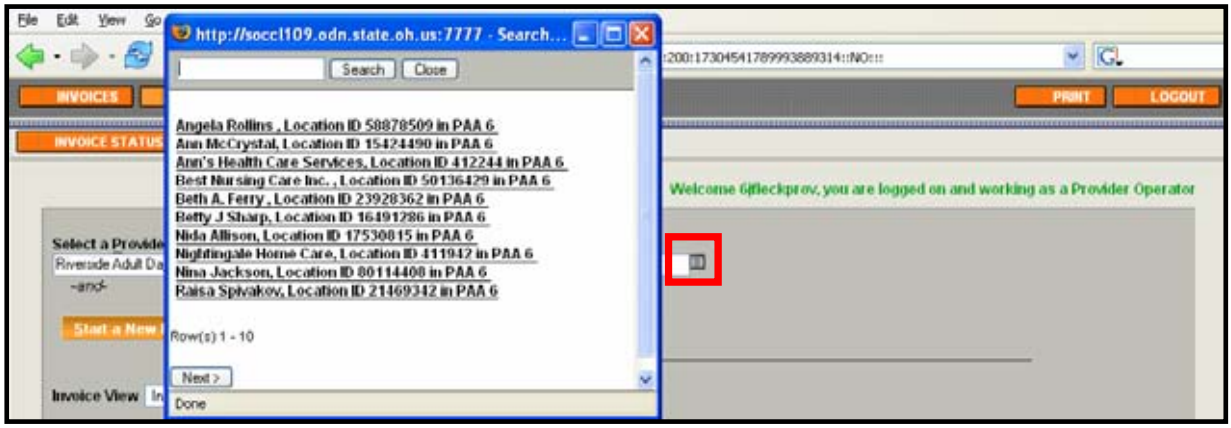
7. Click Start a New Invoice. Proceed to Section IX. c) Enter New Invoice.


Welcome 6dbrownadmin, you are registered as a PAA Administrator working on behalf of 6jfleckprov
WORK AS MYSELF
Work as a Provider
Select a Provider Location and PAA from the drop-down list.
Nightingale Home Care, Location ID · 411942 · in · PAA 6
-and-
Start a New Invoice

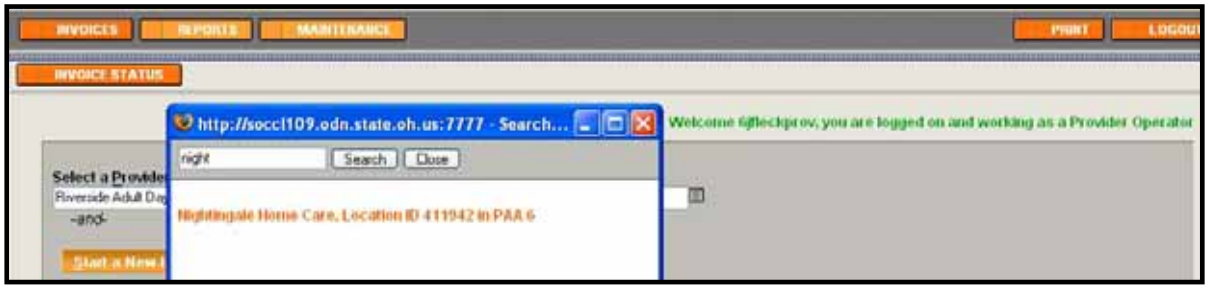
IX. Invoice Entry (con't.)

b) Start New Invoice – Provider Operator Role

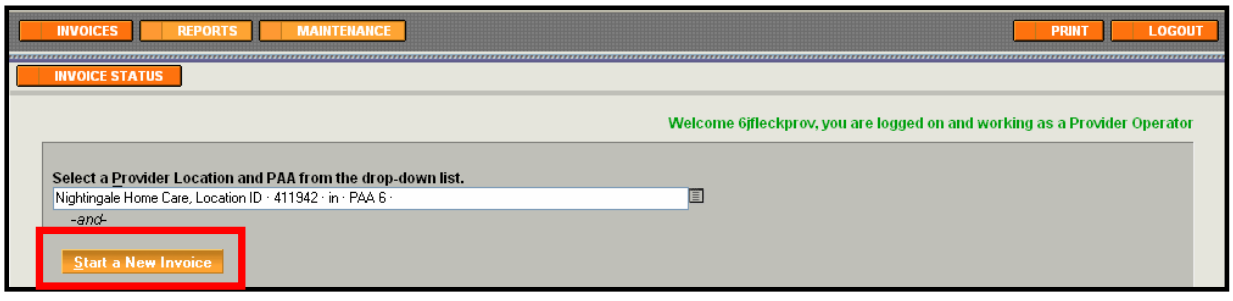
1. From the Invoices screen, click the list icon next to "Select a Provider Location and PAA from the drop-down list" to generate the list of authorized provider location(s). The first ten names will appear. Click the Next button to see the next ten names. If a Location ID is missing, contact your PAA to have it added.
   Or, in the text box, type any characters(s) of the provider or location ID. Select the location from the list that populates.


http://soccl109.odn.state.oh.us:7777 - Search...
Search
Close
Angela Rollins , Location ID 58878509 in PAA 6
Ann McCrystal, Location ID 15424490 in PAA 6
Ann's Health Care Services, Location ID 412244 in PAA 6
Best Nursing Care Inc. , Location ID 50136429 in PAA 6
Beth A. Ferry , Location ID 23928362 in PAA 6
Betty J Sharp, Location ID 16491286 in PAA 6
Nida Allison, Location ID 17530815 in PAA 6
Nightingale Home Care, Location ID 411942 in PAA 6
Nina Jackson, Location ID 80114408 in PAA 6
Raisa Spivakov, Location ID 21469342 in PAA 6
Row(s) 1 - 10
Next >
Done
INVOICES
INVOICE STATUS
PRINT
LOGOUT
Welcome 6jfleckprov, you are logged on and working as a Provider Operator
Select a Provide
-and-
Start a New
Invoice View

2. To search for a Location ID, type the first characters of the name in the text box. Click Search. Click the Location ID name to select it.



3. Click Start a New Invoice. Proceed to Section IX. c) Enter New Invoice.

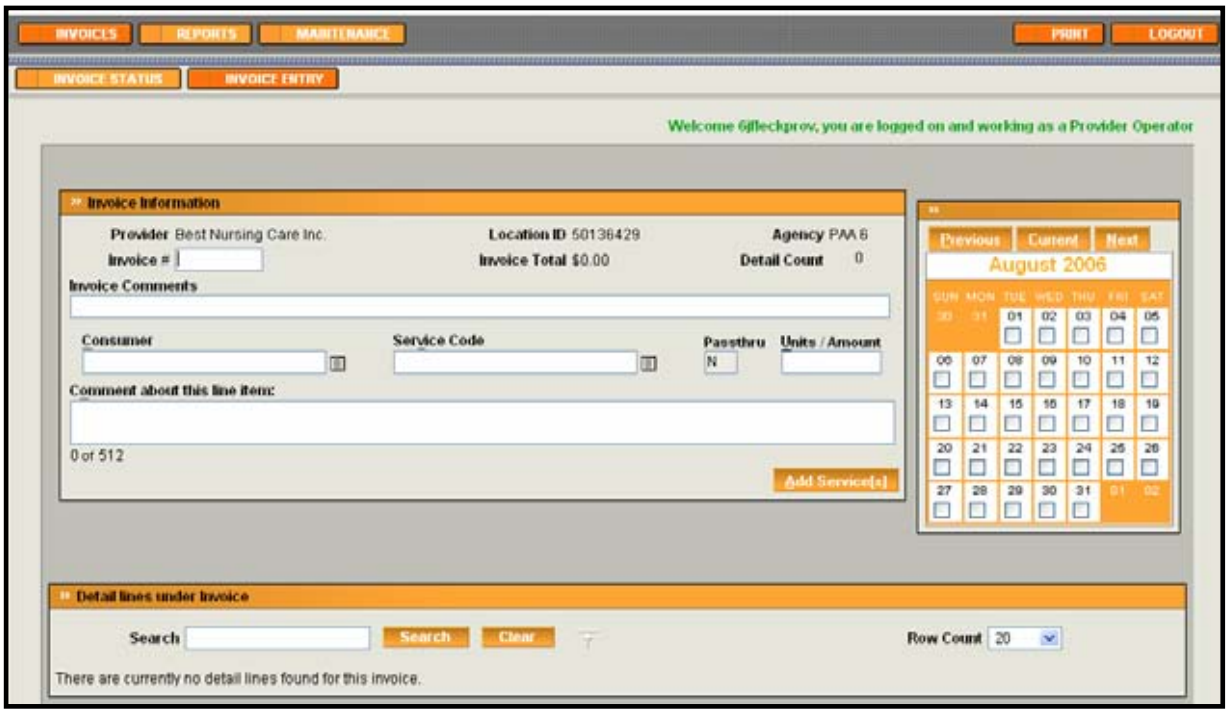

INVOICES
REPORTS
MAINTENANCE
PRINT
LOGOUT
INVOICE STATUS
Welcome 6jfleckprov, you are logged on and working as a Provider Operator
Select a Provider Location and PAA from the drop-down list.
Nightingale Home Care, Location ID · 411942 · in · PAA 6 ·
-and-
Start a New Invoice

IX. Invoice Entry (con't.)

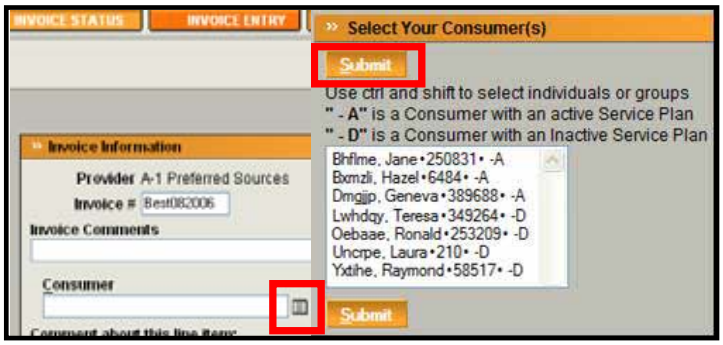
c) Enter New Invoice

- User is logged in as a Provider Operator, a PAA Admin or PAA Operator working on behalf of a provider location.
- An invoice draft is automatically saved in the system and added to the "Invoices in Progress" list, once the Add Service(s) button is clicked and remains in "Invoices in Progress" status until submitted
- Data is saved every time an action/modification is made to the invoice.
- To remove an entire invoice before submitting, click Remove Invoice button.
- To submit an invoice click Submit Invoice button. **Submitted invoices cannot be edited.**

1. From the Invoices screen, select the correct authorized provider location.
2. Click Start a New Invoice. The blank Invoice Entry screen will appear.



3. **Invoice #**: Enter an invoice number. Character limit is 10 characters.
4. **Invoice Comments**: If necessary, enter a comment to describe the invoice.
5. **Consumer**:
   - Click the Consumer list icon to populate a list of consumers. The consumers listed are specific to the Location ID selected.
   - The letter "A" after a name is a consumer with an active Service Plan. These consumers are sorted first.
   - The letter "D" after a name is a consumer with an Inactive Service Plan.

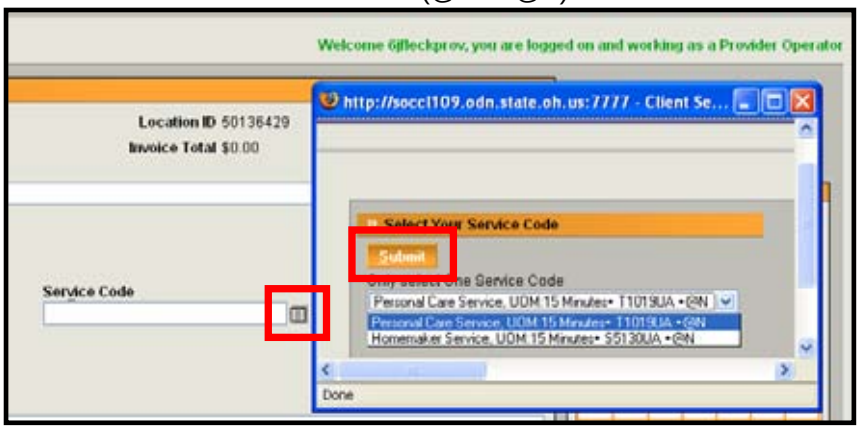

INVOICE STATUS
INVOICE ENTRY
Select Your Consumer(s)
Submit
Use ctrl and shift to select individuals or groups
" - A" is a Consumer with an active Service Plan
" - D" is a Consumer with an Inactive Service Plan
Invoice Information
Provider A-1 Preferred Sources
Invoice # Best082006
Invoice Comments
Consumer
Bhflme, Jane • 250831 • -A
Bxmzli, Hazel • 6484 • -A
Dmgjp, Geneva • 389688 • -A
Lwhdqy, Teresa • 349264 • -D
Oebaae, Ronald • 253209 • -D
Uncrpe, Laura • 210 • -D
Yxtihe, Raymond • 58517 • -D
Submit

   - Use CTRL to select individual consumer(s) or SHIFT to select a group of consumers.
   - Click Submit to select the consumer(s).
   - Or type any part of the consumers first or last name or consumer number. Select the consumer from the list that populates.

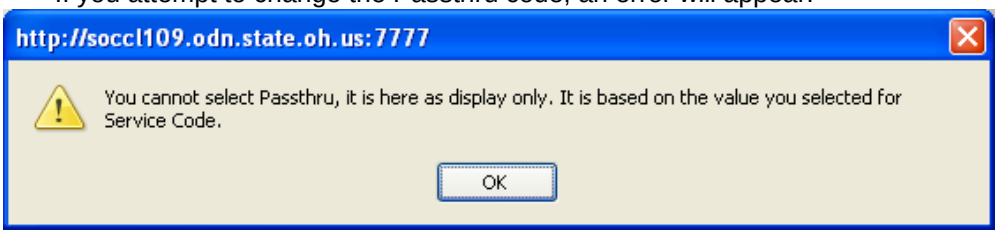
IX. Invoice Entry (con't.)

Enter New Invoice (con't.)

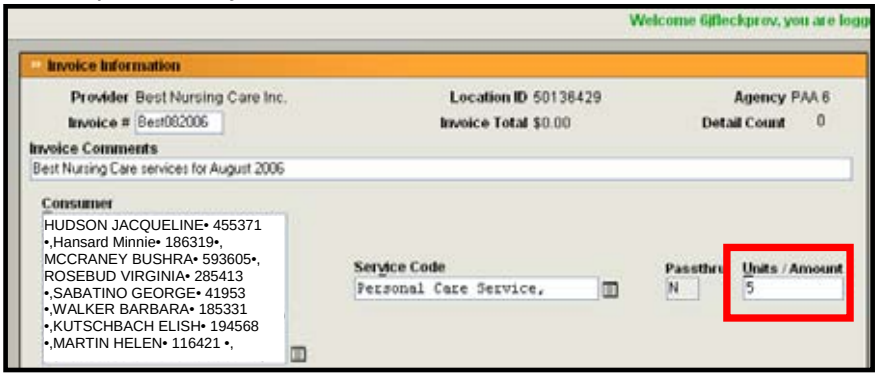
6. **Service Code**:
   - Click the Service Code list icon to populate the list of available Service Codes. Select only One Service Code and click Submit.
   - Or type the first characters(s) of the service code description or the service code number. Select the service code from the list that populates.
   - Displayed will be a description of the service code, unit of measure, service code number and if it is a Passthru or not (@N or @Y).


Welcome 6jfleckprov, you are logged on and working as a Provider Operator
Location ID 50136429
Invoice Total $0.00
http://soccl109.odn.state.oh.us:7777 - Client Se...
Select Your Service Code
Submit
Service Code
Personal Care Service, UOM 15 Minutes• T1019UA •@N
Homemaker Service, UOM 15 Minutes• S5130UA •@N
Done

7. **Passthru**:
   - The user cannot change the Passthru code. The value is based on the Service Code selected.
   - If you attempt to change the Passthru code, an error will appear.


http://soccl109.odn.state.oh.us:7777
You cannot select Passthru, it is here as display only. It is based on the value you selected for Service Code.
OK

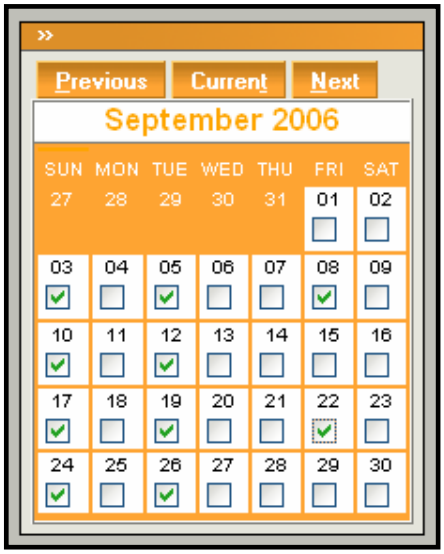
8. **Units/Amount**:
   - When the service code is a non-passthru (Passthru = N), then a whole number (positive or negative) is entered. Amounts do not appear for non-passthru services. Amounts will be applied when the PASSPORT agency receives the invoice.
   - When the service code is a passthru (Passthru = Y), enter the appropriate dollar amount for the passthru services.
   - If an incorrect value is entered, an error message will appear: Units/Amount must be entered as whole numbers (positive or negative). Partial units (decimals or fractions) are not permitted by rule. Please correct the "Units/Amount" field and then resubmit.


Invoice Information
Provider Best Nursing Care Inc.
Location ID 50136429
Agency PAA 6
Invoice # Best082006
Invoice Total $0.00
Detail Count 0
Invoice Comments
Best Nursing Care services for August 2006
Consumer
HUDSON JACQUELINE• 455371 •,Hansard Minnie• 186319•, MCCRANEY BUSHRA• 593605•, ROSEBUD VIRGINIA• 285413 •,SABATINO GEORGE• 41953 •,WALKER BARBARA• 185331 •,KUTSCHBACH ELISH• 194568 •,MARTIN HELEN• 116421 •,
Service Code
Personal Care Service,
Passthru
N
Units / Amount
5

IX. Invoice Entry (con't.)

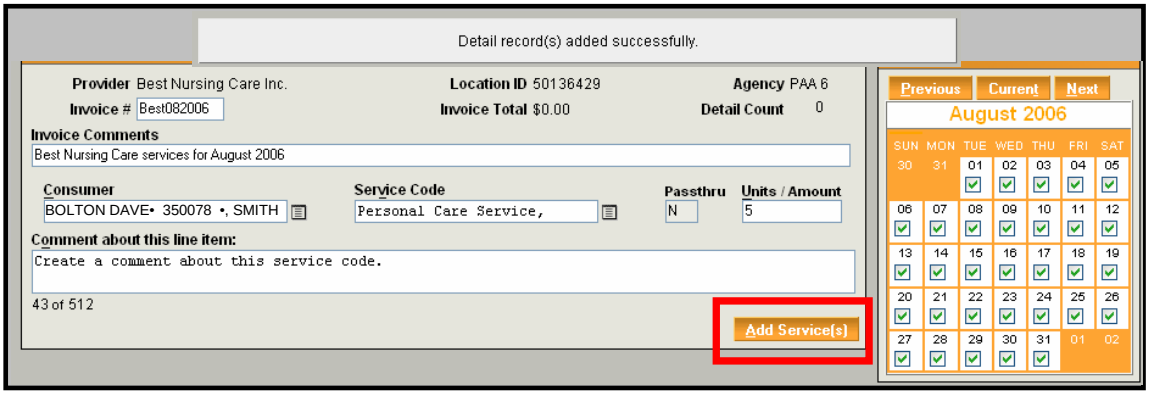
Enter New Invoice (con't.)

9. **Service Date(s)**:
   - At least one Service Date must be selected from the calendar.
   - Click Previous to display the previous month, click Current to display the current month and click Next to display the next month.
   - Date(s) can be selected by:
     - Clicking the check box under the date to select an individual day or days
     - Clicking the name of the week (Sun, Mon, etc.) to select all those days for the month
     - Clicking the month to select all the days in that month
   - Date(s) can be de-selected by:
     - Clicking the checkmark on the individual date(s)
     - Clicking the name of the week
     - Clicking the month



10. **Comment about this line item**:
    - If necessary, type a comment about this service code. Limit of 512 characters.

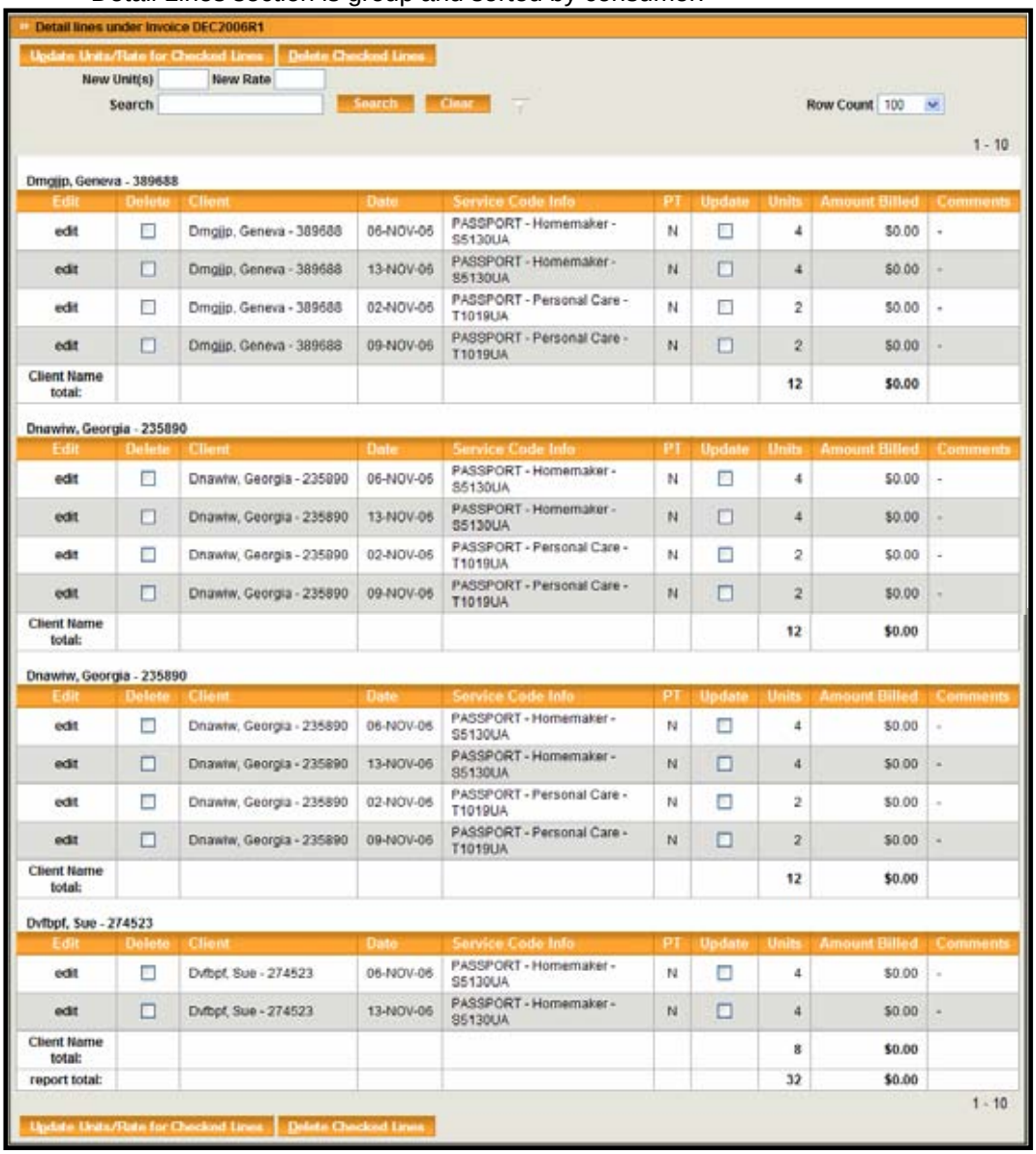
11. **Add Service(s)**:
    - After consumer(s), service code, date(s) and comments are selected/entered; click Add Service(s).
    - This will populate the Detail Lines section and a confirmation will be generated by the system: Detail record(s) added successfully.



IX. Invoice Entry (con't.)

Enter New Invoice (con't.)

12. **Detail Lines**:
    - Detail Lines section is group and sorted by consumer.



Detail lines under Invoice DEC2006R1

Update Units/Rate for Checked Lines | Delete Checked Lines

New Unit(s) | New Rate | Search | Search | Clear | Row Count 100

1 - 10

Dmgjjp, Geneva - 389688

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	Comments
edit	☐	Dmgjjp, Geneva - 389688	06-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dmgjjp, Geneva - 389688	13-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dmgjjp, Geneva - 389688	02-NOV-06	PASSPORT - Personal Care - T1019UA	N	☐	2	$0.00	-
edit	☐	Dmgjjp, Geneva - 389688	09-NOV-06	PASSPORT - Personal Care - T1019UA	N	☐	2	$0.00	-
Client Name total:							12	$0.00	

Dnawiw, Georgia - 235890

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	Comments
edit	☐	Dnawiw, Georgia - 235890	06-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dnawiw, Georgia - 235890	13-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dnawiw, Georgia - 235890	02-NOV-06	PASSPORT - Personal Care - T1019UA	N	☐	2	$0.00	-
edit	☐	Dnawiw, Georgia - 235890	09-NOV-06	PASSPORT - Personal Care - T1019UA	N	☐	2	$0.00	-
Client Name total:							12	$0.00	

Dnawiw, Georgia - 235890

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	Comments
edit	☐	Dnawiw, Georgia - 235890	06-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dnawiw, Georgia - 235890	13-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dnawiw, Georgia - 235890	02-NOV-06	PASSPORT - Personal Care - T1019UA	N	☐	2	$0.00	-
edit	☐	Dnawiw, Georgia - 235890	09-NOV-06	PASSPORT - Personal Care - T1019UA	N	☐	2	$0.00	-
Client Name total:							12	$0.00	

Dvfbpf, Sue - 274523

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	Comments
edit	☐	Dvfbpf, Sue - 274523	06-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dvfbpf, Sue - 274523	13-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
Client Name total:							8	$0.00	
report total:							32	$0.00	

1 - 10

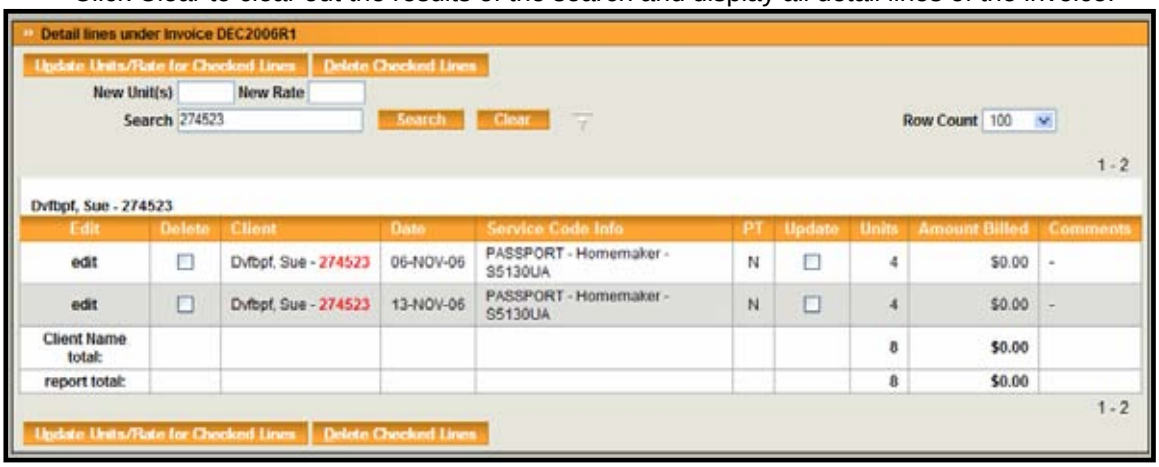
Update Units/Rate for Checked Lines | Delete Checked Lines

13. **Next steps**:
    - Repeat steps 5 thru 11 to bill additional service(s) for a consumer(s) on same invoice.
    - Edit the invoice before submitting. Proceed to X. Edit an Invoice.
    - Stop and finish the invoice later. Once the Add Service(s) button is clicked or when an action/modification is made to the invoice, an invoice draft is saved and added to the "Invoices in Progress" list. See Section XII. Invoice Status Views.
    - To submit the invoice, proceed to Section XI. Submit Invoice.

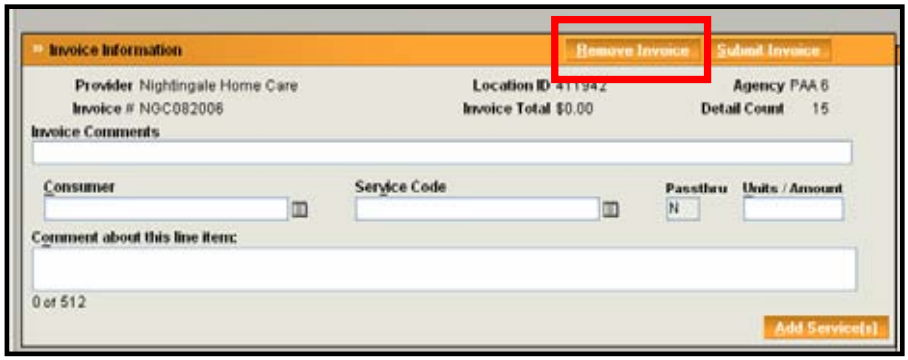
X. Edit an Invoice

- User is logged in as a Provider Operator, a PAA Admin or PAA Operator working on behalf of a provider location.

a) Search Detail Lines
- To conduct a search, enter the text or date in the Search text box. The Client, Date and Service Code Info columns will be searched.
- Click Search. The system will return the result of the search.
- Click Clear to clear out the results of the search and display all detail lines of the invoice.

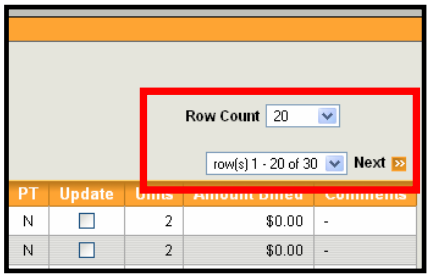


b) Remove Invoice
- To remove an entire invoice before submitting, click Remove Invoice button.



c) Edit Detail lines

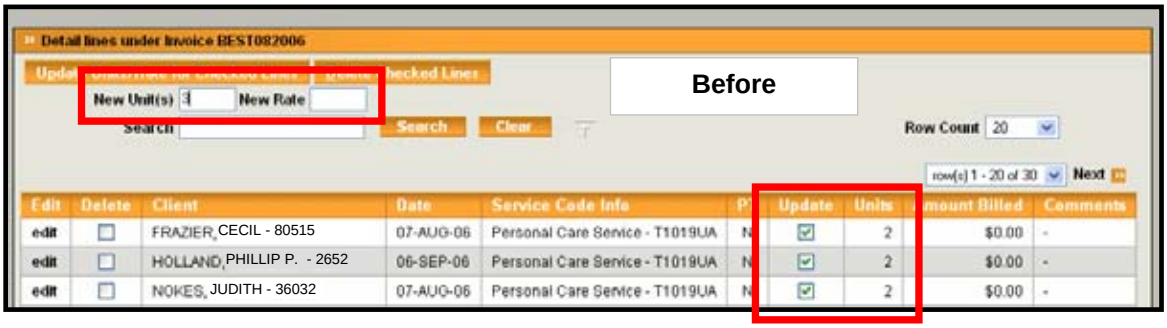
1. **Detail line Row Count**:
   - The first 20 rows of billing detail is displayed. Click the Next button to show the next 20 rows. Click the Previous button to show the previous 20 rows.
   - Click the drop down next to row count to display additional rows. Up to 10,000 rows can be displayed.



X. Edit an Invoice (con't.)

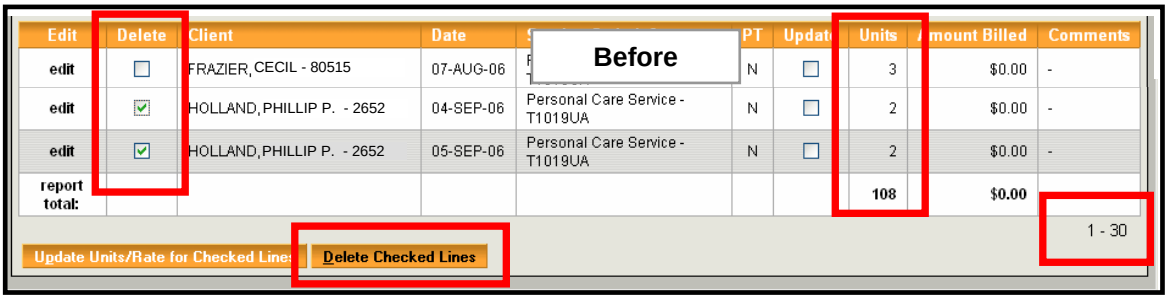
c) Edit Detail lines (con't.)

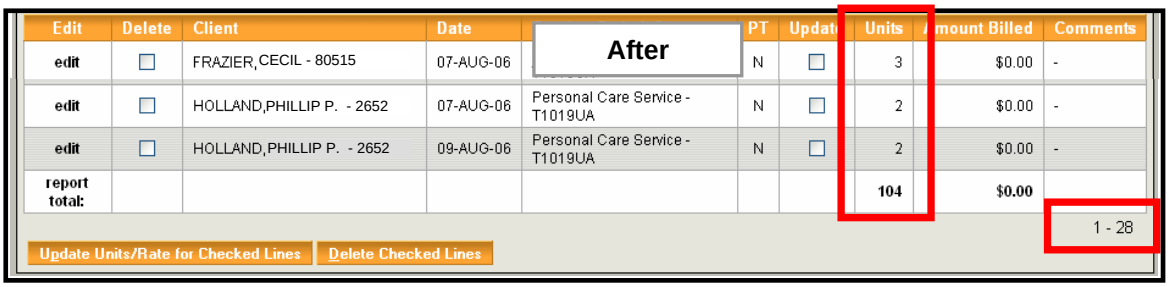
2. **Update Units/Rate for Checked Line(s)**
   - To edit the unit or rate for a line(s), click the Update checkbox for the specific line/client.
   - In the New Unit(s) or New Rate text box, enter the revised value.
   - Click Update Units/Rate for Checked Lines button.
   - Confirmation will be generated by the system: Changes to Units/Rate for selected Consumers were made as requested.


Detail lines under Invoice BEST082006
New Unit(s)
New Rate
Search
Clear
Before
Row Count 20
Next
Edit Delete Client Date Service Code Info PT Update Units Amount Billed Comments
edit FRAZIER,CECIL - 80515 07-AUG-06 Personal Care Service - T1019UA N 2 $0.00
edit HOLLAND,PHILLIP P. - 2652 06-SEP-06 Personal Care Service - T1019UA N 2 $0.00
edit NOKES,JUDITH - 36032 07-AUG-06 Personal Care Service - T1019UA N 2 $0.00

Update Units/Rate for Checked Lines
Delete Checked Lines
New Unit(s)
New Rate
Search
Clear
After
Row Count 20
Next
Edit Delete Client Date Service Code Info PT Units Amount Billed Comments
edit FRAZIER,CECIL - 80515 07-AUG-06 Personal Care Service - T1019UA N 3 $0.00
edit HOLLAND,PHILLIP P. - 2652 06-SEP-06 Personal Care Service - T1019UA N 3 $0.00
edit NOKES,JUDITH - 36032 07-AUG-06 Personal Care Service - T1019UA N 3 $0.00

3. **Delete Checked Lines**
   - To delete a line(s) from the invoice, click the Delete checkbox for the specific line/client.
   - Click Delete Checked Lines button to remove the line(s) from the invoice.


Edit Delete Client Date PT Units Amount Billed Comments
edit FRAZIER,CECIL - 80515 07-AUG-06 N 3 $0.00
edit HOLLAND,PHILLIP P. - 2652 04-SEP-06 Personal Care Service - T1019UA N 2 $0.00
edit HOLLAND,PHILLIP P. - 2652 05-SEP-06 Personal Care Service - T1019UA N 2 $0.00
report total: 108 $0.00
Before
1 - 30
Update Units/Rate for Checked Lines
Delete Checked Lines


Edit Delete Client Date PT Units Amount Billed Comments
edit FRAZIER,CECIL - 80515 07-AUG-06 N 3 $0.00
edit HOLLAND,PHILLIP P. - 2652 07-AUG-06 Personal Care Service - T1019UA N 2 $0.00
edit HOLLAND,PHILLIP P. - 2652 09-AUG-06 Personal Care Service - T1019UA N 2 $0.00
report total: 104 $0.00
After
1 - 28
Update Units/Rate for Checked Lines
Delete Checked Lines

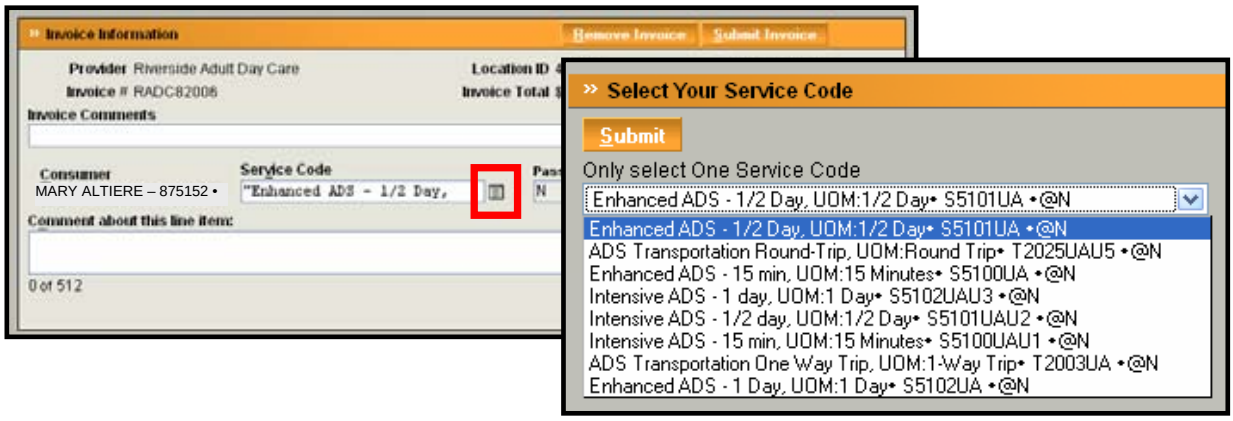
X. Edit an Invoice (con't.)

c) Edit Detail lines (con't.)

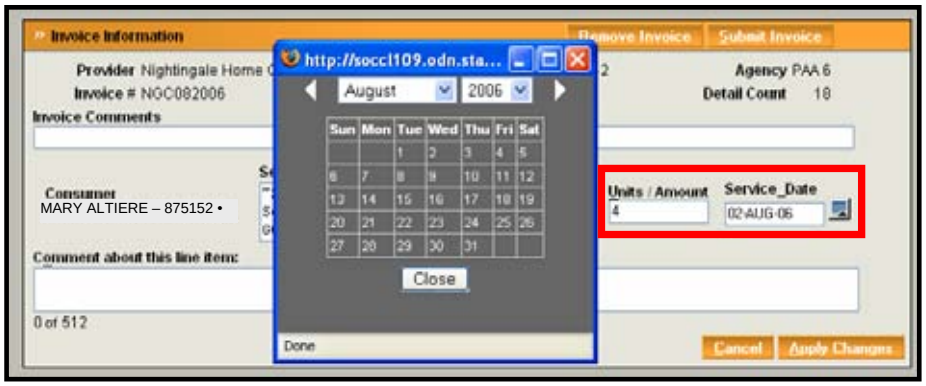
4. **Edit an Individual Line**

- Click **edit** next to the individual client/line to change any of the elements—service code, units/amount or service date. The client/consumer cannot be changed.
- Invoice information for the individual consumer/line will appear.

- Service Code: To change the Service Code, click the list icon and select the correct service code from the dialog box. Click submit.


Invoice Information
Remove Invoice
Submit Invoice
Provider Riverside Adult Day Care
Invoice # RADC82006
Invoice Comments
Consumer
MARY ALTIERE – 875152 •
Service Code
"Enhanced ADS - 1/2 Day,
Comment about this line item:
0 of 512
Select Your Service Code
Submit
Only select One Service Code
Enhanced ADS - 1/2 Day, UOM:1/2 Day• S5101UA •@N
Enhanced ADS - 1/2 Day, UOM:1/2 Day• S5101UA •@N
ADS Transportation Round-Trip, UOM:Round Trip• T2025UAU5 •@N
Enhanced ADS - 15 min, UOM:15 Minutes• S5100UA •@N
Intensive ADS - 1 day, UOM:1 Day• S5102UAU3 •@N
Intensive ADS - 1/2 day, UOM:1/2 Day• S5101UAU2 •@N
Intensive ADS - 15 min, UOM:15 Minutes• S5100UAU1 •@N
ADS Transportation One Way Trip, UOM:1-Way Trip• T2003UA •@N
Enhanced ADS - 1 Day, UOM:1 Day• S5102UA •@N

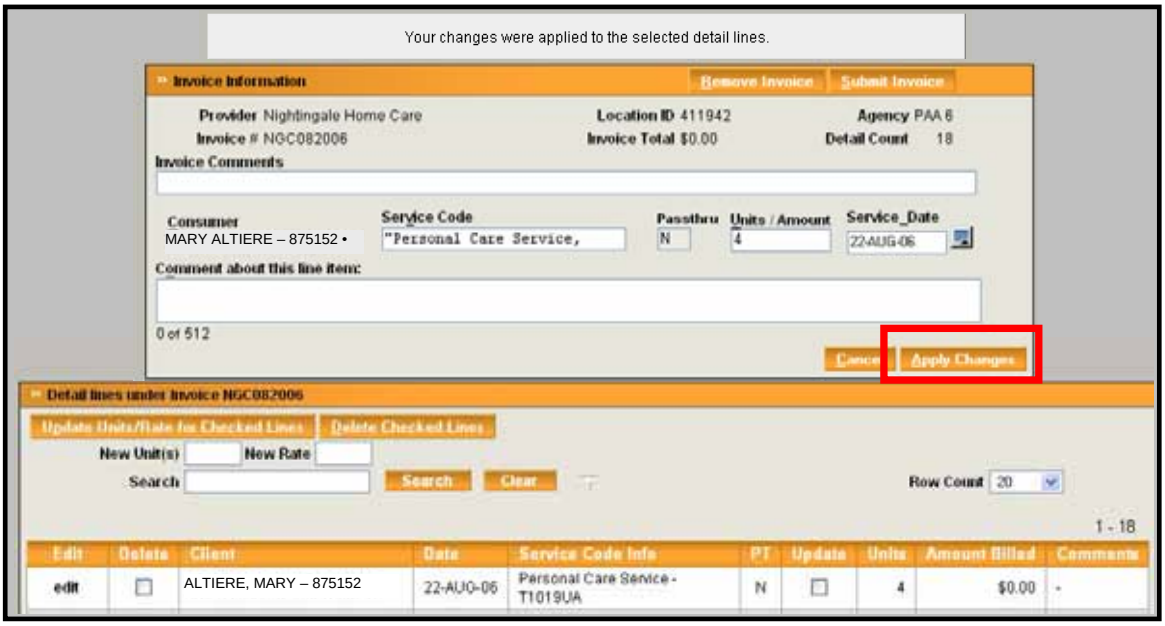
- New Units/Amount: Enter a new unit(s) or amount.
- Service Date: Click the Calendar icon next to the date text box to display the calendar. Select the correct date. Click the forward/back icons to go forward/back a month or click the drop down arrow next to the month or year to change the month or year. Click Close to close the dialog box without changing the date.



X. Edit an Invoice (con't.)

c) Edit Detail lines (con't.)

4. Edit an Individual Line
   - Click Cancel to cancel the updates.
   - Click Apply Changes to apply the updates.
   - The system will return a confirmation: Your changes were applied to the selected detail line.

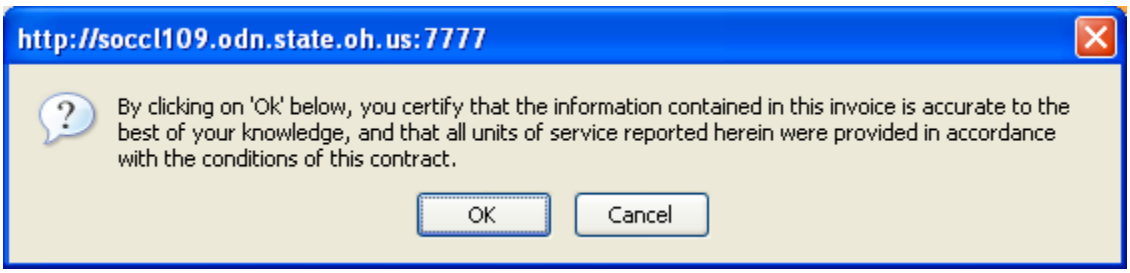


XI. Submit Invoice

- User is logged in as a Provider Operator, a PAA Admin or PAA Operator working on behalf of a provider location.

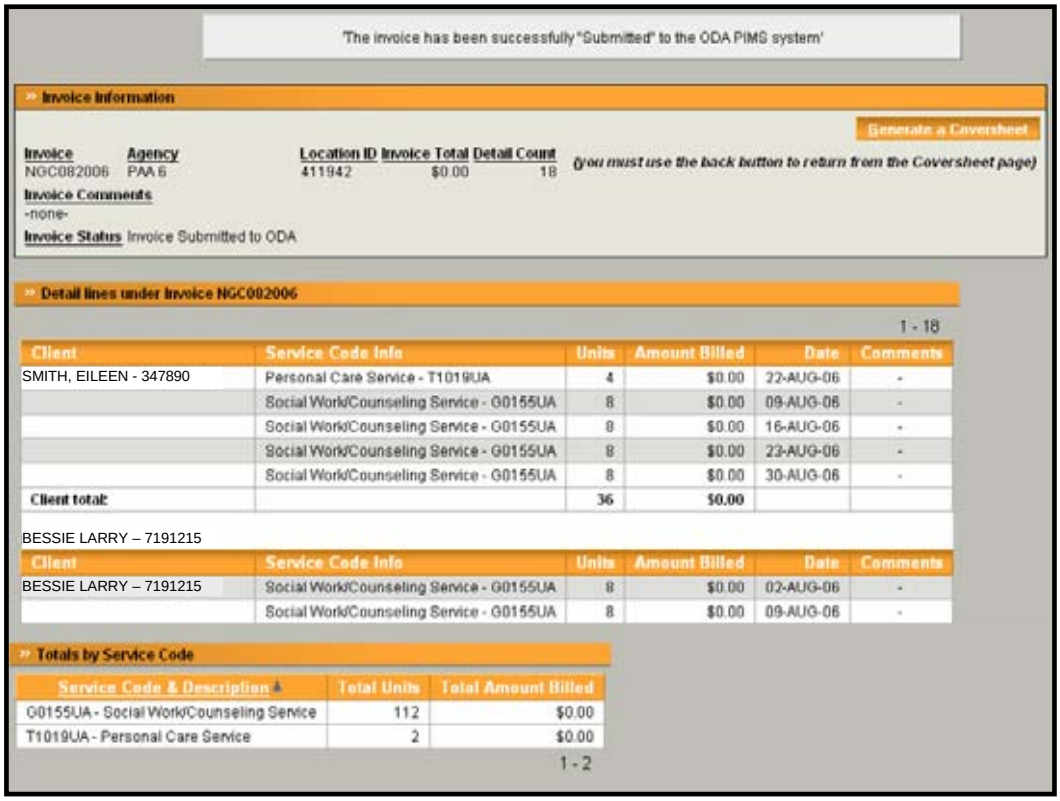
a) Once all charges are entered and edits/changes confirmed, click Submit Invoice

b) A dialog box will appear asking the user to, "…certify that the information contained in this invoice is accurate…" Click Ok to submit the invoice or click Cancel to cancel the submit invoice process. The user will be brought back to the Invoice Information screen.


http://soccl109.odn.state.oh.us:7777
By clicking on 'Ok' below, you certify that the information contained in this invoice is accurate to the best of your knowledge, and that all units of service reported herein were provided in accordance with the conditions of this contract.
OK
Cancel

XI. Submit Invoice (con't.)

c) The user will receive a confirmation from the system: The invoice has been successfully "Submitted" to the ODA PIMS system. The details of the invoice will be displayed.



'The invoice has been successfully "Submitted" to the ODA PIMS system'

Invoice Information

Generate a Coversheet

Invoice	Agency	Location ID	Invoice Total	Detail Count
NGC082006	PAA 6	411942	$0.00	18

(you must use the back button to return from the Coversheet page)

Invoice Comments
-none-

Invoice Status Invoice Submitted to ODA

Detail lines under Invoice NGC082006

1 - 18

Client	Service Code Info	Units	Amount Billed	Date	Comments
SMITH, EILEEN - 347890	Personal Care Service - T1019UA	4	$0.00	22-AUG-06	-
	Social Work/Counseling Service - G0155UA	8	$0.00	09-AUG-06	-
	Social Work/Counseling Service - G0155UA	8	$0.00	16-AUG-06	-
	Social Work/Counseling Service - G0155UA	8	$0.00	23-AUG-06	-
	Social Work/Counseling Service - G0155UA	8	$0.00	30-AUG-06	-
Client total:		**36**	**$0.00**		

BESSIE LARRY – 7191215

Client	Service Code Info	Units	Amount Billed	Date	Comments
BESSIE LARRY – 7191215	Social Work/Counseling Service - G0155UA	8	$0.00	02-AUG-06	-
	Social Work/Counseling Service - G0155UA	8	$0.00	09-AUG-06	-

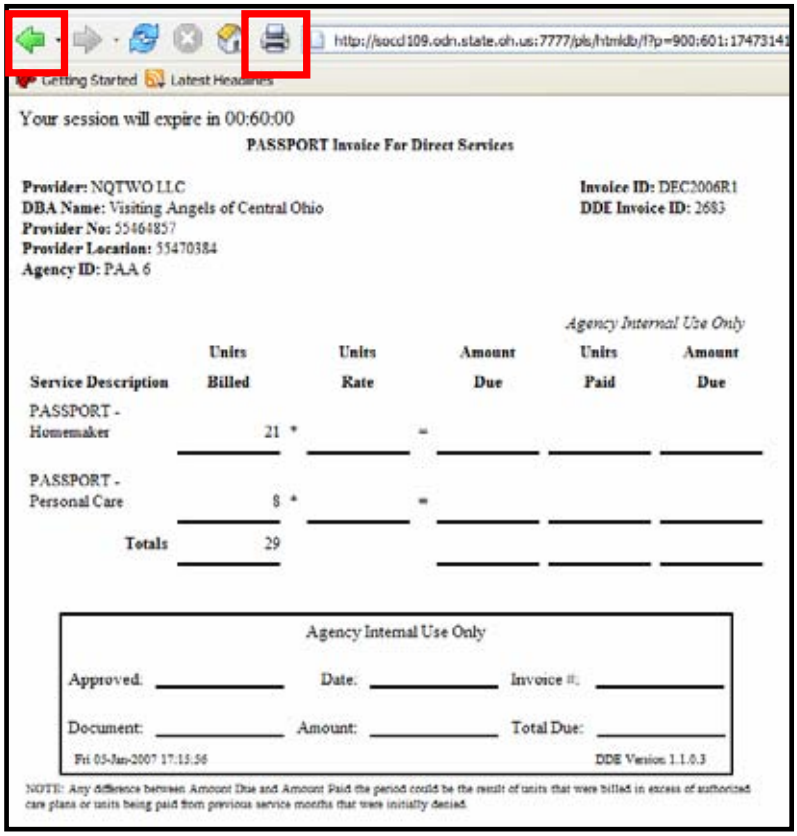
Totals by Service Code

Service Code & Description	Total Units	Total Amount Billed
G0155UA - Social Work/Counseling Service	112	$0.00
T1019UA - Personal Care Service	2	$0.00

1 - 2

d) Coversheet

- Click Generate a Coversheet button to create the PASSPORT Invoice for Direct Services coversheet.
- Click the browser's print button to send to printer.
- Click the browser's back button to return to the submitted invoice details.



http://socd109.odn.state.oh.us:7777/pls/htmldb/f?p=900:601:17473141

Getting Started Latest Headlines

Your session will expire in 00:60:00

PASSPORT Invoice For Direct Services

Provider: NQTWO LLC
DBA Name: Visiting Angels of Central Ohio
Provider No: 5546857
Provider Location: 55470384
Agency ID: PAA 6

Invoice ID: DEC2006R1
DDE Invoice ID: 2683

Agency Internal Use Only

Service Description	Units Billed		Units Rate		Amount Due	Units Paid	Amount Due
PASSPORT - Homemaker	21	*		=			
PASSPORT - Personal Care	8	*		=			
Totals	29						

Agency Internal Use Only

Approved: _____ Date: _____ Invoice #: _____

Document: _____ Amount: _____ Total Due: _____

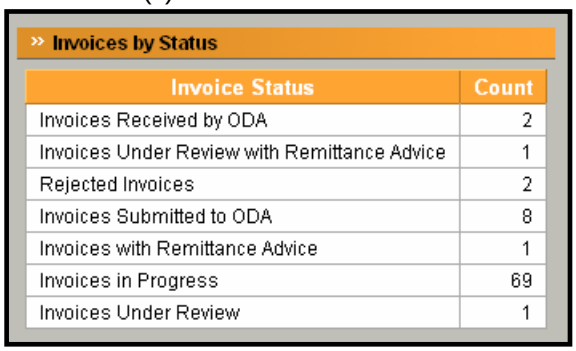
Fri 05-Jan-2007 17:15:56 DDE Version 1.1.0.3

NOTE: Any difference between Amount Due and Amount Paid the period could be the result of units that were billed in excess of authorized care plans or units being paid from previous service months that were initially denied.

XII. Invoice Status Views

- Click the Invoices button to display the Invoice Status screen.
- User is logged in as a Provider Operator, a PAA Administrator or PAA Operator or PAA Administrator or PAA Operator working on behalf of a provider location.
- The PAA Administrator and PAA Operator Roles can view all invoices and view Provider invoices by working on behalf of a provider location. The Provider Operator's view is limited to their Authorized Location(s).
- Invoice Views Available: Invoices Received by ODA, Invoices Submitted to ODA, Invoices Under Review, Invoices Under Review with Remittance Advice, Invoices In Progress, Invoices with Remittance Advice and Rejected Invoices
- Click on a column heading to sort data in ascending or descending order.
- Click an invoice number to view the details or to finish an invoice in progress.

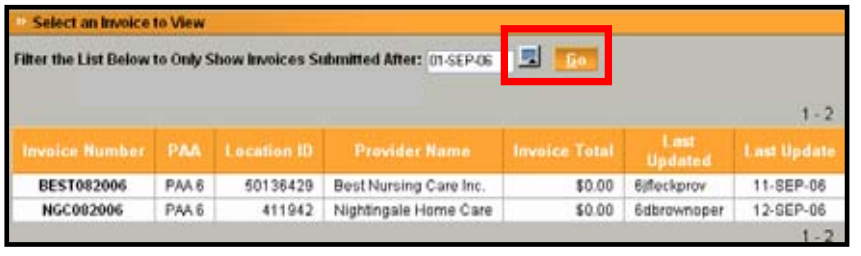
a) Invoices by Status
- The Invoices by Status score card is displayed at the bottom of every Invoice View.
- The table will list the status of all invoices for the PAA Administrator and PAA Operator Roles.
- The table for the Provider Operator Role will list the status of all invoices for their Authorized Location(s).



» Invoices by Status

Invoice Status	Count
Invoices Received by ODA	2
Invoices Under Review with Remittance Advice	1
Rejected Invoices	2
Invoices Submitted to ODA	8
Invoices with Remittance Advice	1
Invoices in Progress	69
Invoices Under Review	1

b) Filter the List
- The "Filter the List Below to Only Show Invoices Submitted After" a specified date is available with all Invoice Views except Invoices in Progress.
- To filter the list, click the Calendar icon to display the calendar.
- Select a date. Click the forward/back icons to go forward/back a month or click the drop down arrow next to the month or year to change the month or year. Click Close to close the dialog box without changing the date.
- Click Go. A filtered list will display based on the date selected.



» Select an Invoice to View

Filter the List Below to Only Show Invoices Submitted After: 01-SEP-06 Go

1 - 2

Invoice Number	PAA	Location ID	Provider Name	Invoice Total	Last Updated	Last Update
BEST082006	PAA 6	50136429	Best Nursing Care Inc.	$0.00	6jfleckprov	11-SEP-06
NGC082006	PAA 6	411942	Nightingale Home Care	$0.00	6dbrownoper	12-SEP-06

1 - 2

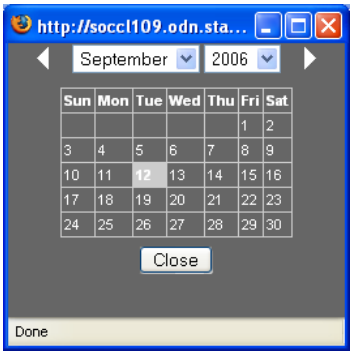
» Select an Invoice to View

Filter the List Below to Only Show Invoices Submitted After: 12-SEP-06 Go

1 - 1

Invoice Number	PAA	Location ID	Provider Name	Invoice Total	Last Updated	Last Update
NGC082006	PAA 6	411942	Nightingale Home Care	$0.00	6dbrownoper	12-SEP-06

1 - 1



XII. Invoice Status Views (con't.)

c) Invoice Views Available

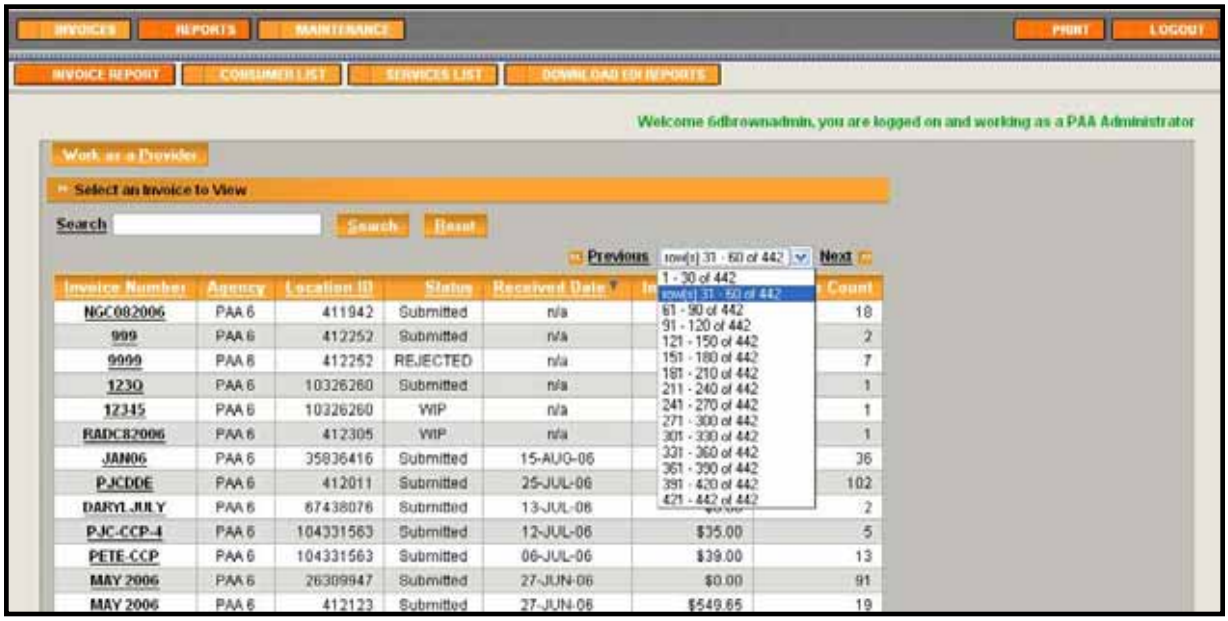
- **Invoices Received by ODA** – Displays invoices received by ODA PIMS/PASSPORT system.
- **Invoices Submitted to ODA** – Displays invoices sent to ODA PIMS/PASSPORT, but not yet acknowledged as received.
- **Invoices Under Review** – Displays invoice under review by an ODA agent or a process. No remittance available.
- **Invoices Under Review with Remittance Advice** – Displays invoices under review by an ODA agent or a process. Remittance advice available for a portion of the invoice.
- **Invoices In Progress** – Displays invoices in progress–not submitted to ODA. The user is able to select an invoice and make edits and changes. Invoices stay in progress until submitted.
- **Invoices with Remittance Advice** – Displays invoices paid with remittance advice available in DDE.
- **Rejected Invoices** – Displays invoices rejected in full by case manager.

XIII.Reports

- The PAA Administrator and PAA Operator Roles can display all invoices for their site and must work on behalf of a provider location to display the Provider's consumer list, service list and to download EDI reports. The Provider Operator's display is limited to their authorized location(s).
- Click a column heading to sort data in ascending or descending order.

a) Invoice Report

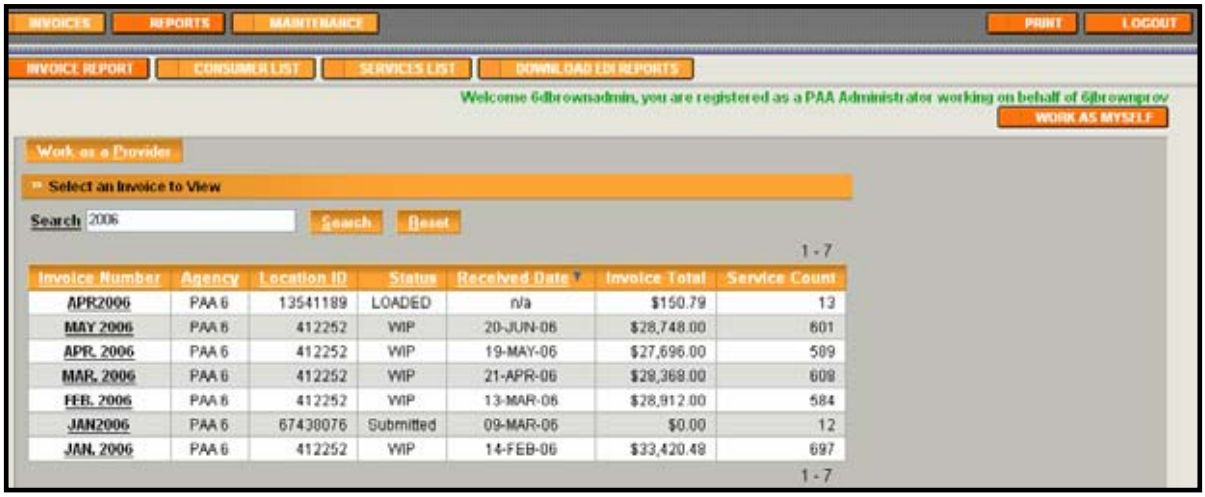
- Click the Reports button to display Invoice Report.
- The first 30 rows will be displayed. Click Next to see additional data or click the drop down arrow to select more rows to be displayed. Click the previous button to go back 30 rows.


INVOICES
REPORTS
MAINTENANCE
PRINT
LOGOUT
INVOICE REPORT
CONSUMER LIST
SERVICES LIST
DOWNLOAD EDI REPORTS
Welcome 6dbrownadmin, you are logged on and working as a PAA Administrator
Work as a Provider
Select an Invoice to View
Search
Search
Reset
Previous
Next
1 - 30 of 442
31 - 60 of 442
61 - 90 of 442
91 - 120 of 442
121 - 150 of 442
151 - 180 of 442
181 - 210 of 442
211 - 240 of 442
241 - 270 of 442
271 - 300 of 442
301 - 330 of 442
331 - 360 of 442
361 - 390 of 442
391 - 420 of 442
421 - 442 of 442
Invoice Number | Agency | Location ID | Status | Received Date | Count
NGC082006 | PAA 6 | 411942 | Submitted | n/a | 18
999 | PAA 6 | 412252 | Submitted | n/a | 2
9999 | PAA 6 | 412252 | REJECTED | n/a | 7
1230 | PAA 6 | 10326260 | Submitted | n/a | 1
12345 | PAA 6 | 10326260 | WIP | n/a | 1
RADC82006 | PAA 6 | 412305 | WIP | n/a | 1
JAN06 | PAA 6 | 35836416 | Submitted | 15-AUG-06 | 36
PJCDDE | PAA 6 | 412011 | Submitted | 25-JUL-06 | 102
DARYLJULY | PAA 6 | 67438076 | Submitted | 13-JUL-06 | 2
PJC-CCP-4 | PAA 6 | 104331563 | Submitted | 12-JUL-06 | $35.00 | 5
PETE-CCP | PAA 6 | 104331563 | Submitted | 06-JUL-06 | $39.00 | 13
MAY 2006 | PAA 6 | 26309947 | Submitted | 27-JUN-06 | $0.00 | 91
MAY 2006 | PAA 6 | 412123 | Submitted | 27-JUN-06 | $549.65 | 19

XIII. Reports (con't.)

b) Search Invoice Report

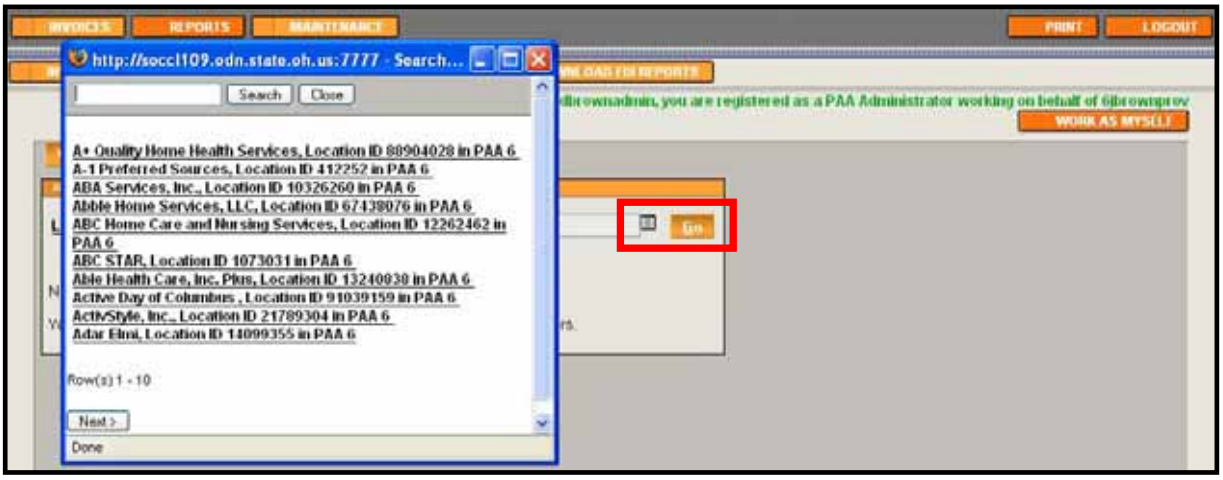
- To Search, enter a search string in the Search text box and click Search. Click Reset to display the entire list and clear the text box.
- Invoice Number, Agency, Location ID, Status and Received Date are searched.


INVOICES
REPORTS
MAINTENANCE
PRINT
LOGOUT
INVOICE REPORT
CONSUMER LIST
SERVICES LIST
DOWNLOAD EDI REPORTS
Welcome 6dbrownadmin, you are registered as a PAA Administrator working on behalf of 6jbrownprov
WORK AS MYSELF
Work as a Provider
Select an Invoice to View
Search 2006
Search
Reset
1 - 7
Invoice Number | Agency | Location ID | Status | Received Date | Invoice Total | Service Count
APR2006 | PAA 6 | 13541189 | LOADED | n/a | $150.79 | 13
MAY 2006 | PAA 6 | 412252 | WIP | 20-JUN-06 | $28,748.00 | 601
APR. 2006 | PAA 6 | 412252 | WIP | 19-MAY-06 | $27,696.00 | 589
MAR. 2006 | PAA 6 | 412252 | WIP | 21-APR-06 | $28,368.00 | 608
FEB. 2006 | PAA 6 | 412252 | WIP | 13-MAR-06 | $28,912.00 | 584
JAN2006 | PAA 6 | 67438076 | Submitted | 09-MAR-06 | $0.00 | 12
JAN. 2006 | PAA 6 | 412252 | WIP | 14-FEB-06 | $33,420.48 | 697
1 - 7

c) Consumer and Service Lists

The user must either be logged in as Provider Operator or be working on behalf of one to view the Consumer and Service Lists.

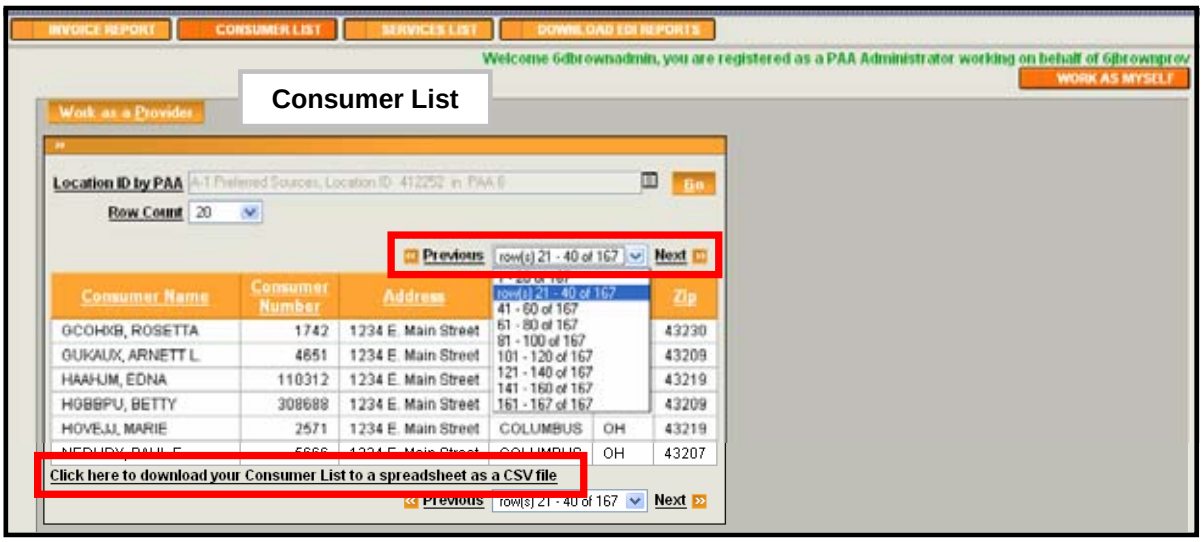
1. Click the list icon next to "Location ID by PAA" to generate the list of Authorized Location(s) for this user. The first ten rows of names will appear. If necessary, click the Next button to see the next ten names. To search for a Location ID, type the first characters of the name in the text box. Click Search.
2. Click the Location ID name to select it.

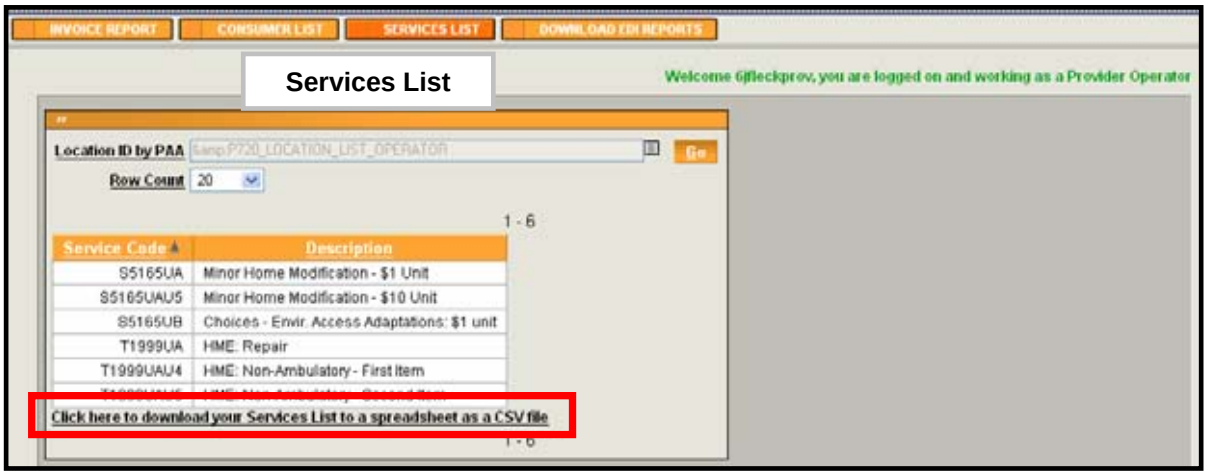

http://soccl109.odn.state.oh.us:7777 - Search...
Search
Close
A+ Quality Home Health Services, Location ID 88904028 in PAA 6
A-1 Preferred Sources, Location ID 412252 in PAA 6
ABA Services, Inc., Location ID 10326260 in PAA 6
Abble Home Services, LLC, Location ID 67438076 in PAA 6
ABC Home Care and Nursing Services, Location ID 12262462 in PAA 6
ABC STAR, Location ID 1073031 in PAA 6
Able Health Care, Inc. Plus, Location ID 13240930 in PAA 6
Active Day of Columbus , Location ID 91039159 in PAA 6
ActivStyle, Inc., Location ID 21789304 in PAA 6
Adar Elmi, Location ID 14099355 in PAA 6
Row(s) 1 - 10
Next >
Done
Go

XIII. Reports (con't.)

Consumer and Service Lists (con't.)

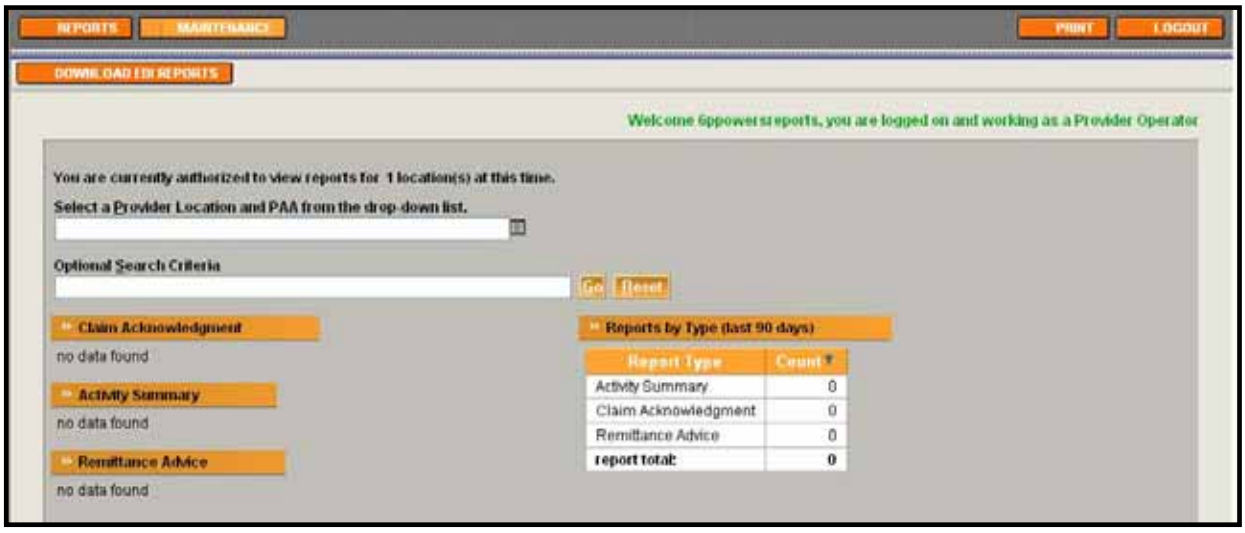
3. Click Go. A report of Consumers or Services specific to the location ID will display. The Consumer list will display Consumer Name, Consumer Number, Address, City, State and Zip. The Services Lists will display Service Code and Description. Click a column heading to sort data in ascending or descending order.
4. Click Next to see additional data or click the drop down arrow next to row(s) X-XX to select more rows to be displayed. Click the Previous button to go back.
5. To download the report, click "Click here to download your Consumer List to a spreadsheet as a CSV file." Follow the browser's download instructions. The file can be opened in Microsoft Excel.


Consumer List
Location ID by PAA
Row Count 20
Previous
row(s) 21 - 40 of 167
Next
Consumer Name
Consumer Number
Address
Zip
GCOHXB, ROSETTA 1742 1234 E. Main Street 43230
GUKAUX, ARNETT L 4651 1234 E. Main Street 43209
HAAHJM, EDNA 110312 1234 E. Main Street 43219
HGBBPU, BETTY 308688 1234 E. Main Street 43209
HOVEJJ, MARIE 2571 1234 E. Main Street COLUMBUS OH 43219
OH 43207
Click here to download your Consumer List to a spreadsheet as a CSV file


Services List
Location ID by PAA
Row Count 20
1 - 6
Service Code
Description
S5165UA Minor Home Modification - $1 Unit
S5165UAU5 Minor Home Modification - $10 Unit
S5165UB Choices - Envir. Access Adaptations: $1 unit
T1999UA HME: Repair
T1999UAU4 HME: Non-Ambulatory - First Item
Click here to download your Services List to a spreadsheet as a CSV file

XIV. Download EDI Reports – All Roles

- The PAA Administrator and PAA Operator Roles must work on behalf of a provider location to display the information on this page.
- The Provider Operator Invoices and Reports and the Provider Operator Report's Only Roles display is limited to their authorized location(s).
- A table of reports available for download (for the last 90 days) will display.



a) Reports Available for Download
   - **Claims Acknowledgment** – Report of rejected claims. Naming convention CA + invoice number entered in Invoice Entry section. Ex: CABest082006.pdf
   - **Activity Summary** – Status of report of invoice submitted. Naming convention AS + invoice number entered in Invoice Entry section. Ex: ASBest082006.pdf
   - **Remittance Advice** – Remittance Advice reported generated from PIMS.
   - **Reports by Type (last 90 days)** – Displays a score card of reports available for download for the last 90 days.

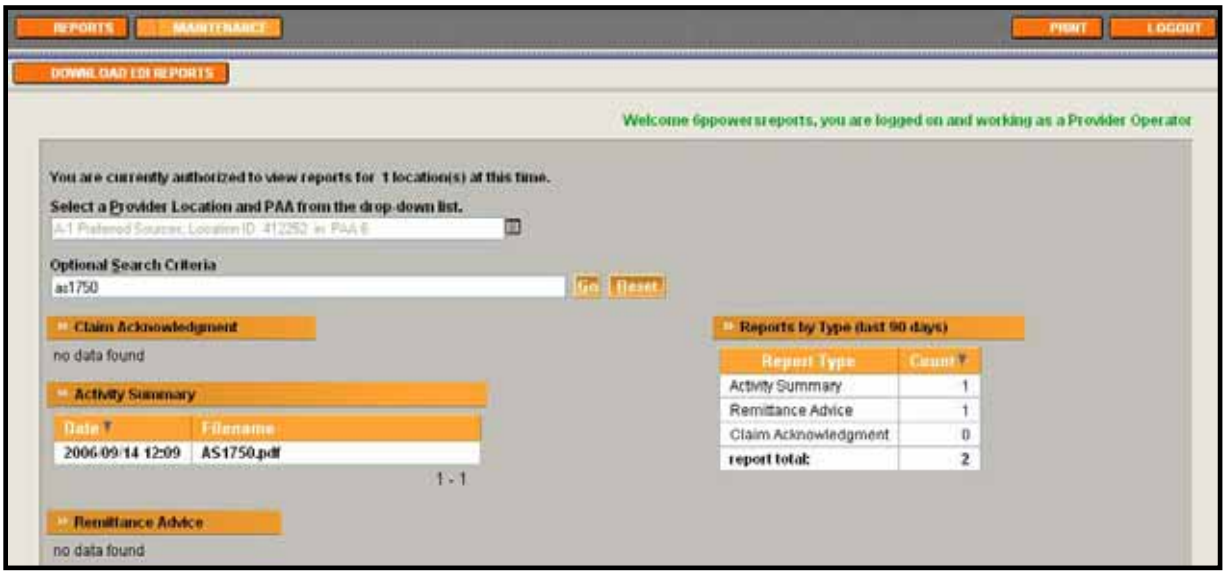
b) Select Provider Location
   1. In the text box, type any characters(s) of the provider or location ID. Select the location from the list that populates.
      Or click the list icon next to "Select a Provider Location and PAA from the drop-down list" to generate the list of Authorized Location(s). The first ten rows of names will appear. If necessary, click the Next button to see the next ten names. To search for a Location ID, type the first characters of the name in the text box. Click Search.

   2. Click the Location ID name to select it. Click Go.

DOWNLOAD EDI REPORTS
http://soccl109.odn.state.oh.us:7777 - Search...
Search
Close
A+ Quality Home Health Services, Location ID 8890-4028 in PAA 6
A-1 Preferred Sources, Location ID 412252 in PAA 6
ABA Services, Inc., Location ID 10326260 in PAA 6
Abble Home Services, LLC, Location ID 67438076 in PAA 6
Able Health Care, Inc. Plus, Location ID 13240838 in PAA 6
ADT Companion Service, Location ID 13541189 in PAA 6
Medicall Inc, Location ID 412147 in PAA 6
Go
Reset

XIV. Download EDI Reports – All Roles (con't.)

c) Search
1. Enter a search string that is contained in the Filename or Date timestamp in the "Optional Search Criteria" text box. Ex: Enter 2005/12/16 to find all reports that have a creation date of December 16th, 2005.
2. Click Go. Click Reset to clear the search text box and display all reports available.



d) Download a Report
- The reports are in PDF format. In order to view the report, Adobe Reader must be installed. A free download is available here: http://www.adobe.com/products/acrobat/readstep2.html

1. Click on the Filename or the Date of the report.
2. Follow the browser's instructions to either Open or Save the report.